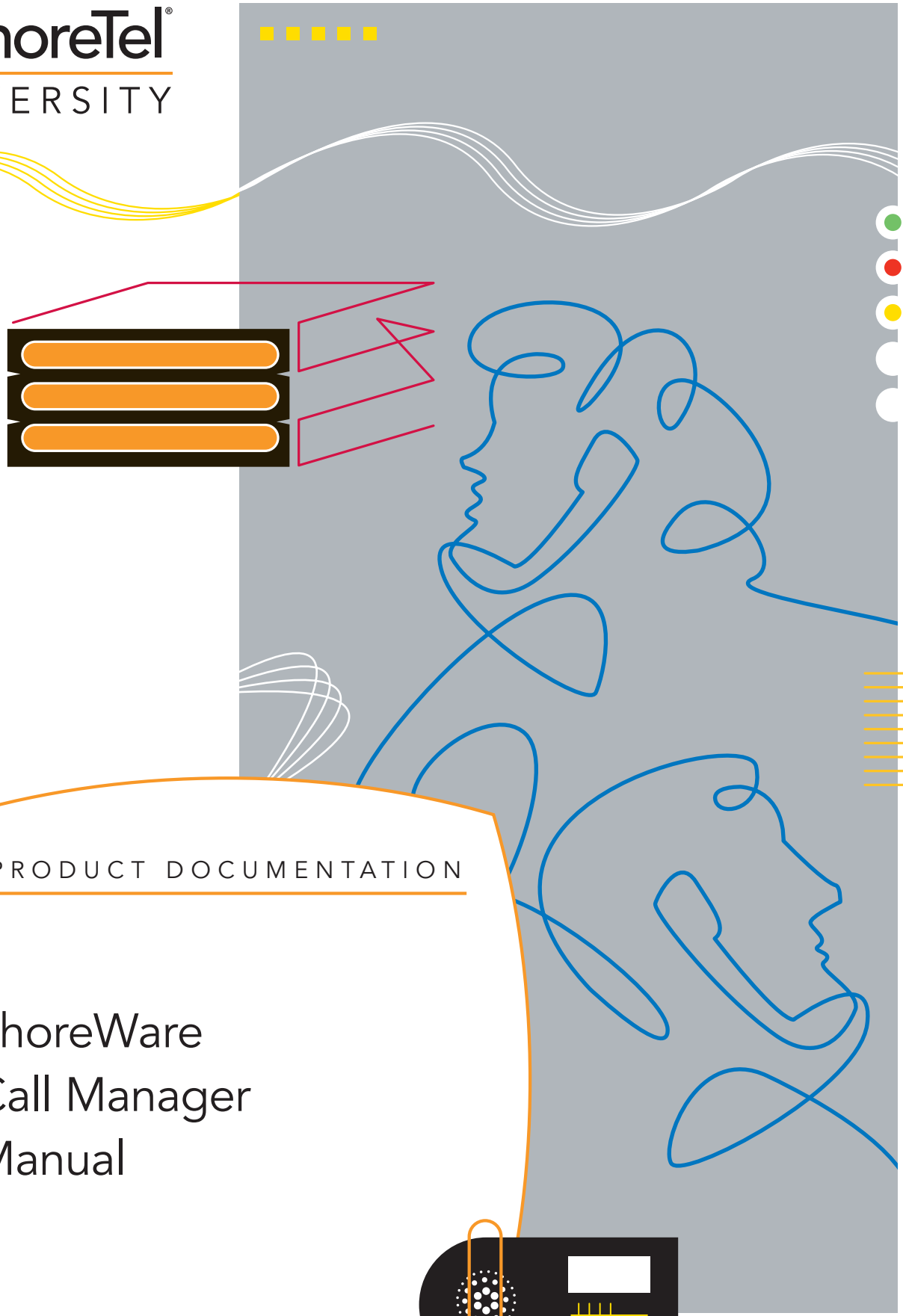
ShoreTel UNIVERSITY



PRODUCT DOCUMENTATION

ShoreWare Call Manager Manual

RELEASE 9

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Table of Contents

TABLE OF CONTENTS 3

CHAPTER 1: INTRODUCTION 9
1.1 Call Manager Description . . . 9
1.2 Call Manager Types . . . 9
1.3 System Requirements . . . 10
1.3.1 Operating Systems . . . 10
1.3.2 Hardware Requirements . . . 10
1.3.3 Video Requirements . . . 11

CHAPTER 2: GETTING STARTED 13
2.1 Introduction . . . 13
2.2 Installation . . . 13
2.2.1 Normal Installation . . . 13
2.2.2 64-bit Platform Support . . . 13
2.3 Access to Call Manager . . . 14
2.3.1 Starting Call Manager . . . 14
2.3.2 Exiting Call Manager . . . 14
2.3.3 Closing and Opening Call Manager . . . 14
2.3.4 Active Directory Integration . . . 15
2.4 Usage Preferences . . . 16
2.4.1 Language Selection . . . 16
2.4.2 Sound Preferences . . . 17
2.4.3 Configuring the External Number Prefix . . . 17

CHAPTER 3: ACCESSING CALL MANAGER 19
3.1 Call Manager Windows . . . 19
3.1.1 Window Types . . . 19
3.1.2 Window Components . . . 20
3.1.3 Manipulating Call Manager Windows . . . 24
3.2 Viewing Modes . . . 28
3.2.1 Normal Mode . . . 29
3.2.2 Miniature . . . 29
3.2.3 Docked . . . 29
3.2.4 System Tray . . . 30
3.3 Viewers . . . 30

CHAPTER 4: VOICE CALLS 33
4.1 Introduction . . . 33
4.2 Extension Assignment . . . 33
4.2.1 Home Device . . . 33
4.2.2 SoftPhone . . . 34
4.2.3 Office Anywhere . . . 34

4.3 Configuring Device Options . . . 35
4.3.1 Handsfree Mode . . . 35
4.3.2 Call Stack Size . . . 35
4.3.3 Specifying the Auto Off-Hook Device . . . 36
4.3.4 Suppressing the Call Waiting Tone . . . 36
4.4 Making a Call . . . 37
4.5 Managing Incoming Calls . . . 38
4.5.1 Inbound Call Signals . . . 38
4.5.2 Answering Calls . . . 39
4.5.3 Rerouting Inbound Calls . . . 40
4.5.4 Automated Call Handling . . . 41
4.5.5 Personalized Call Handling . . . 44
4.5.6 Find Me . . . 51
4.6 During an Active Call . . . 52
4.6.1 Adjusting the Volume . . . 52
4.6.2 Handling Multiple Calls . . . 52
4.6.3 Call Transfer . . . 53
4.6.4 Call Interruptions . . . 56
4.6.5 Call Recording . . . 58
4.6.6 Sending Tones . . . 59
4.6.7 Ending a Call . . . 59
4.7 Specialty Calls . . . 60
4.7.1 Conference Calls . . . 60
4.7.2 Converged Conferencing . . . 63
4.7.3 Video Calls . . . 63
4.7.4 Intercom . . . 65
4.7.5 Overhead Page . . . 65
4.8 Call Intervention . . . 66
4.8.1 Barge In . . . 66
4.8.2 Silent Monitor . . . 66
4.8.3 Whisper Page . . . 67
4.8.4 Unparking Calls from Other Extensions . . . 67
4.9 History Viewer . . . 68
4.9.1 History Viewer Components . . . 68
4.9.2 Managing History Viewer Records . . . 69
4.9.3 History Viewer Display Options . . . 70
4.9.4 Initiating Calls from the History Viewer . . . 70
4.10 Call Routing Slips . . . 71

CHAPTER 5: INSTANT MESSAGING 73

5.1 Description . . . 73
5.2 The Instant Message Window . . . 73
5.3 Conducting an IM Conversation . . . 74
5.3.1 Initiating an IM Conversation . . . 74
5.3.2 Receiving the First IM of a Conversation . . . 75
5.3.3 Creating and Sending a Message . . . 76
5.3.4 Adding a Participant to a Chat Session . . . 76
5.3.5 Terminating an Instant Message Session . . . 76
5.4 Configuring Instant Messaging . . . 76
5.4.1 Privacy and Control Access . . . 76
5.4.2 Instant Messaging Options . . . 76

CHAPTER 6: PRESENCE 77

6.1 Description . . . 77
6.2 Presence Types . . . 77
6.2.1 Telephony Presence . . . 77
6.2.2 IM Presence . . . 78
6.2.3 Combined Presence . . . 80
6.3 Displaying Presence . . . 80
6.3.1 Configuring Display Options . . . 80
6.3.2 Presence Change Alerts . . . 81
6.4 IM Presence Privacy . . . 81
6.4.1 Privacy States . . . 82
6.4.2 Responding to Presence Access Requests . . . 82
6.4.3 Managing the Privacy Access List . . . 83
6.4.4 Access Request Settings . . . 83

CHAPTER 7: SOFTPHONE 85

7.1 Introduction . . . 85
7.2 Using the SoftPhone . . . 85
7.2.1 Assigning SoftPhone to Your Extension . . . 85
7.2.2 Managing SoftPhone Calls through Call Manager . . . 85
7.2.3 Keypad . . . 86
7.2.4 Muting the SoftPhone . . . 86
7.3 Configuring SoftPhone . . . 86

CHAPTER 8: MANAGING ADDRESS ENTRIES 87

8.1 Introduction . . . 87
8.2 Directory Viewer . . . 87
8.2.1 Directory Components . . . 87
8.2.2 Managing the Directory . . . 89
8.2.3 Managing Personal Directory Entries . . . 90
8.2.4 Initiating Calls through the Directory Viewer . . . 91
8.3 Contact Viewer . . . 92
8.3.1 Contacts . . . 92
8.3.2 Contact Viewer Components . . . 93
8.3.3 Managing Contacts . . . 94
8.3.4 Contact List Operations . . . 96
8.4 Importing Contacts from other applications . . . 97
8.4.1 Implementation . . . 97
8.4.2 File Properties . . . 98
8.5 Speed Dial . . . 104
8.5.1 Speed Dial Viewer . . . 104
8.5.2 Managing Speed Dial Entries . . . 105

CHAPTER 9: MANAGING VOICE MAIL 107

9.1 Introduction . . . 107
9.2 Mailboxes and Messages . . . 107
9.2.1 Mailboxes . . . 107
9.2.2 Voice Messages . . . 108
9.3 Voice Mail Viewer . . . 109
9.3.1 Viewer Components . . . 109

9.3.2 Managing Viewer Contents . . . 111
9.4 Managing Voice Messages . . . 112
9.4.1 Listening to a Message . . . 112
9.4.2 Replying to a Voice Message . . . 112
9.4.3 Forwarding a Voice Message . . . 113
9.4.4 Calling the Sender . . . 114
9.4.5 Editing the Subject Header . . . 114
9.4.6 Recording and Sending a New Voice Message . . . 114
9.4.7 Viewing Voice Message Information . . . 115
9.5 Voice Mail Notification . . . 115
9.5.1 Introduction . . . 115
9.5.2 Personal Notification . . . 115
9.5.3 Notification Escalation . . . 116
9.6 Distribution Lists . . . 118
9.6.1 Distribution List Types . . . 118
9.6.2 Distribution Lists panel . . . 118
9.6.3 Managing User Distribution Lists . . . 120
9.6.4 Using a Distribution List . . . 122
9.7 Configuring Voice Mail . . . 123
9.7.1 Options and Preferences . . . 123
9.7.2 Using System IDs to Address AMIS Voice Mail . . . 123

CHAPTER 10: WORKGROUPS AND OPERATORS 125

10.1 Introduction . . . 125
10.2 Client Types . . . 125
10.2.1 Workgroup Agent . . . 125
10.2.2 Workgroup Supervisor . . . 125
10.2.3 Operator . . . 126
10.3 Workgroup Status . . . 126
10.3.1 Logging into and out of a Workgroup . . . 126
10.3.2 Call Wrap-Up . . . 126
10.4 Viewer Descriptions . . . 127
10.4.1 Queue Monitor . . . 127
10.4.2 Agent Monitor . . . 129
10.4.3 Bridged Call Appearance Monitor . . . 131
10.5 Viewer Enhancements . . . 134
10.5.1 Voice Mail Viewer . . . 134
10.5.2 Contacts Viewer . . . 135

CHAPTER 11: CONTACT CENTER 137

11.1 Introduction . . . 137
11.2 Requirements . . . 137
11.3 Configuring Contact Center Options . . . 138
11.3.1 Accessing Contact Center Features from Call Manager . . . 141
11.3.2 Contact Center Feature Limitations in Call Manager . . . 141
11.4 Using Contact Center through Call Manager . . . 142

CHAPTER 12: OUTLOOK INTEGRATION 145

12.1 Introduction . . . 145
12.2 Importing Outlook Contacts . . . 145

12.3 Configuring Outlook for Voice Mail 146
12.4 Outlook Calendar Integration 147
12.4.1 Installing Calendar Integration. 147
12.4.2 Configuring Outlook for Automatic Call Handling 147
12.4.3 Configuring Call Handling for an Appointment 148
12.4.4 Changing and Cancelling Automatic Call Handling 148

APPENDIX A: OPTIONS AND PREFERENCES WINDOW 151

A.1 Introduction 151
A.2 Panel Descriptions 151
A.2.1 General panel 151
A.2.2 QuickDialer 151
A.2.3 Call Handling Mode 153
A.2.4 Mode Configuration Panels 154
A.2.5 Office Anywhere 156
A.2.6 Find Me 157
A.2.7 Voice Mail. 158
A.2.8 Escalation 159
A.2.9 Outlook. 161
A.2.10 Workgroups 163
A.2.11 Telephony. 164
A.2.12 Personalized Call Handling 165
A.2.13 Instant Messaging. 166
A.2.14 Conferencing 170
A.2.15 SoftPhone 171
A.2.16 Video. 172
A.2.17 Sounds 173
A.2.18 Languages 173

INDEX 175

CHAPTER 1

Introduction

1.1 Call Manager Description

Call Manager is the ShoreWare client application that manages a user's calls, voice mail, and personal system settings through a graphical user interface.

1.2 Call Manager Types

Five Call Manager types span the complete Call Manager feature set. Several Call Manager features require additional individual licenses or specific administrative authorization.

The following is a list of features in each Call Manager type:

- **Personal Call Manager** supports basic voice call and call handling functions, including the following features:
  - Voice call control through a graphical interface
  - Office Anywhere
  - Video calls (require user Video license)
  - Telephony presence
  - Call recording
  - History viewer
  - Directory viewer
  - Speed dial
  - Converged conferencing (requires Conference Bridge Server)
  - MAPI contact import
  - Outlook call handling
  - Outlook VoiceMail integration
  - Programmable buttons.
- **Professional Call Manager** supports the following features:
  - All functions available through Personal Call Manager.
  - Instant Messaging.
  - Instant Messaging presence.
  - Contact viewer.

  ShoreTel includes *SoftPhone* and *Standard Resolution Video* licenses with the purchase of Professional Call Manager. Users must install these licenses, in addition to the Call Manager license, to access SoftPhone and VGA Video.
- **Workgroup Agent Call Manager** supports the following features:
  - All functions available through Professional Call Manager.
  - Ability to transfer calls through dragging and dropping call cells into the Contact viewer.
  - Workgroup access utilities, including login, log out, and wrap up.

— Workgroup Queue Monitor.

ShoreTel includes a *SoftPhone* license with the purchase of Workgroup Call Manager. Users must install this license, in addition to the Call Manager license, to access SoftPhone. The *Standard Resolution Video* license is not provided with Workgroup Agent Call Manager.

- **Workgroup Supervisor Call Manager** supports the following features:

  — All functions available through Workgroup Agent Call Manager.
  — Workgroup Agent Monitor.

  ShoreTel includes a *SoftPhone* license with the purchase of Workgroup Supervisor Call Manager. Users must install this license, in addition to the Call Manager license, to access SoftPhone. The *Standard Resolution Video* license is not provided with Workgroup Supervisor Call Manager.

- **Operator Call Manager** supports the following features:

  — All functions available through Workgroup Supervisor Call Manager.
  — Advanced Contact Viewer functions, including pickup, unpark, edit buddies' active call properties, and edit call notes of buddies.
  — Bridge Call Appearance Monitor.

  ShoreTel includes *SoftPhone* and *Standard Resolution Video* licenses with the purchase of Operator Call Manager. Users must install these licenses, in addition to the Call Manager license, to access SoftPhone and VGA Video.

1.3 System Requirements

1.3.1 Operating Systems

Call Manager is supported on the following operating systems:

- Windows Client Operating System – 32 bit

  — Windows XP Professional – SP1, SP2, or SP3
  — Windows Vista, Business Edition – installation of SP1 optional
  — Windows Vista, Enterprise – installation of SP1 optional

- Windows Terminal Server – 32-bit and 64-bit

  — Windows 2003 SP2 Terminal Server
  — Windows 2003 R2 Terminal Server

- Citrix

  For current information about support for specific Citrix versions and Call Manager features supported on the Citrix platform, refer to the Citrix product bulletin, available at

  https://login.shoretel.com/?src=s&ReturnUrl=%2falerts%2fdownloads%2f2008-06-04.pdf

1.3.2 Hardware Requirements

Computer Hardware requirements for running Call Manager depend on the Call Manager type and the use of video. Table 1-1 displays the minimum recommended configuration for computers running ShoreWare Call Manager.

Call Manager Version	Processor	RAM[a]		Disk Space[b]	Available RAM
		XP	Vista	XP / Vista	XP / Vista
Personal	Pentium 3 – 800 MHz	1 GB	2 GB	1 GB	100 MB
Professional	Pentium 4 – 2.0 GHz	1 GB	2 GB	1 GB	150 MB
Agent, Supervisor, Operator (<40 extension presences)	Pentium 4 – 2.0 GHz	1 GB	2 GB	1 GB	150 MB
Agent, Supervisor, Operator (<500 extension presences)	Pentium 4 – 3.0 GHz	1 GB	2 GB	1 GB	150 MB
All Versions, VGA Video	Dual-Core 1.6 GHz	1 GB	1 GB	1 GB	150 MB
All Versions, XGA Video	Core 2 Quad 2.4 GHz	1 GB	1 GB	1 GB	150 MB

Table 1-1 Client Device Hardware Requirements

a. Lists Call Manager memory requirements during normal operation. When running other office applications on the PC in addition to Call Manager, memory recommendations are 512 MB (XP) or 1 GB (Vista).
b. Disk space requirement is for installation on a system without .NET Framework installed previously. Once installed, Call Manager requires less than 100MB of disk space.

1.3.3 Video Requirements

Computers configured for video calls require the following:

- **VGA Video**: Graphic Card with 64 MB of VRAM, DirectX 9.0c-compatible
- **XGA Video**: Graphic Card with 256 MB of VRAM, DirectX 9.0c-compatible

Video calls require the following bandwidth:

- **VGA**: 600 kbps
- **XGA**: 1.2 Mbps

CHAPTER 2

Getting Started

2.1 Introduction

This chapter discusses installation issues and describes application preferences.

2.2 Installation

Call Manager is a .NET Framework 2.0 application. The Call Manager installer automatically downloads the correct .NET version if it is not present during the upgrade or install. Users are then prompted to accept the End User License Agreement from Microsoft to proceed with the .NET installation. Internet connectivity is required during the installation process.

2.2.1 Normal Installation

Call Manager is installed by clicking the Install button on the Call Manager Install HTML Page, as shown in Figure 2-1. Contact your system administrator for the URL of your Call Manager Installation page.

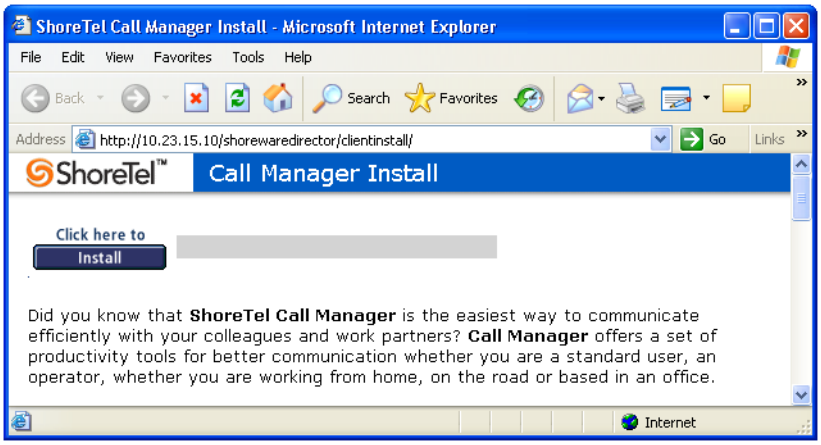

ShoreTel Call Manager Install - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address http://10.23.15.10/shorewaredirector/clientinstall/
Go Links
ShoreTel
Call Manager Install
Click here to
Install
Did you know that ShoreTel Call Manager is the easiest way to communicate efficiently with your colleagues and work partners? Call Manager offers a set of productivity tools for better communication whether you are a standard user, an operator, whether you are working from home, on the road or based in an office.
Internet

Figure 2-1 Call Manager Installation Page

2.2.2 64-bit Platform Support

ShoreTel supports Call Manager on 64-bit Windows 2003 running Citrix or Windows Terminal Server. Call Manager is not supported on systems running 64-bit Windows XP or 64-bit Vista.

Installing Call Manager on 64-bit Windows running Citrix or Windows Terminal Server requires the following steps:

Step 1 Install DotNet Framework for 64-bit Windows Citrix machines – Version 2.0 or higher.

DotNet Framework is not supplied with the ShoreTel installation software. This software is available from Internet sources or from your software vendor.

Step 2 Install Call Manager.

Step 3 Access ***Control Panel -> Phone and Modem -> Advanced (tab)*** and remove ShoreTel Remote TAPI Service Provider.

Step 4 Run TSPInstall.exe

TSPInstall.exe is provided with the ShoreTel installation software.

Installing Call Manager on a 64-bit platform places files in the following folders:

- The default location is `C:\Program Files (x86)`
- The location of 32-bit client dll files is `C:\Windows\SysWow64`

2.3 Access to Call Manager

2.3.1 Starting Call Manager

You start Call Manager by clicking the ***ShoreTel Call Manager*** application icon that was placed on your desktop or Start menu when Call Manager was installed. You can also configure Call Manager to automatically start when you log into Windows.

To configure Call Manager to start when you log into Windows:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select ***Options***.
- Right click the ShoreTel icon in the System Tray and select ***Options***.
- Press Ctrl+O.

Step 2 Select ***General*** in the panel on the left side of the window.

Step 3 Mark the ***Start Call Manager when you login to Windows*** checkbox.

Section A.2.1 on page 151 describes the **Options and Preferences: General** panel.

2.3.2 Exiting Call Manager

Exiting Call Manager terminates program execution. Call Manager must be running to monitor the system for inbound messages, view presence, or engage in instant message conversations.

To exit Call Manager, right click the ShoreTel icon in the System Tray icon and select ***Exit***.

2.3.3 Closing and Opening Call Manager

Closing and Opening Call Manager manipulates the Call Manager window without affecting the run status. Closing Call Manager removes the Call Manager window from the monitor while Call Manager continues to run in the background. Call Manager continues

to monitor the system for inbound voice calls or instant messages. The System Tray displays the ShoreWare icon when Call Manager is operation, regardless if the Call Manager window is open or closed.

Opening Call Manager displays the Call Manager window on your monitor.

To Close the Call Manager window, perform one of the following:

- Click the Application Button and select ***Close***.
- Click the Exit icon on the top right corner of the Call Manager window.
- Press Alt+F4.

To Open the Call Manager window, perform one of the following:

- Right click the ShoreTel icon in the System Tray and select ***Show ShoreTel Call Manager***.
- Double click the ShoreTel icon in the System Tray.
- Call Manager opens when you receive a voice call or instant message.

2.3.4 Active Directory Integration

When ShoreTel Active Directory (AD) Integration is enabled, access to Call Manager is available to all system users, including users without domain accounts or not configured as ShoreTel AD users.

2.3.4.1 Initial Configuration

When installing Call Manager, users authenticated through AD are not queried for their credentials; they are immediately prompted for the server name after which wizard panels guide them through the setup process.

Users that are not authenticated through AD are required to enter their name, password and server name. After verifying the user's credentials, Call Manager guides the user through the setup process.

2.3.4.2 Logging into Call Manager

Attempts to log into Call Manager after the initial setup are handled on the basis of the user's AD configuration. Active Directory users are authenticated by SSO through the verification of their AD credentials. Users not configured for Active Directory are authenticated through the verification of their ShoreTel username and password, as previously loaded through their Call Manager account. In either case, users are typically not required to re-enter their username or password each time they open Call Manager from their computer.

Call Manager behavior when authentication fails is not changed by this feature.

2.3.4.3 User Name – Telephony Options panel

The User Name data field at the top of the Options and Preferences: Telephony panel displays the User name of the Call Manager account. This field is ***read only*** for users authenticated through AD credentials, as shown in Figure 2-2.

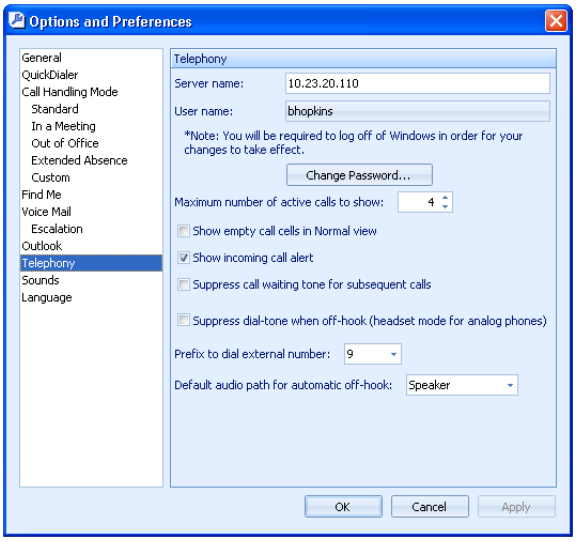


Figure 2-2 Telephony Options – User Name specified through AD

2.4 Usage Preferences

2.4.1 Language Selection

Call Manager displays menus in all languages available on systems that support multiple languages. You can also specify the language through which ShoreWare communicates voice mail audio commands and ShorePhone display messages.

To specify the languages Call Manager uses to display menu information:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select ***Options***.
- Right click the ShoreTel icon in the System Tray and select ***Options***.
- Press Ctrl+O.

Step 2 Select ***Languages*** in the menu on the left side of the window.

Step 3 Select the desired options from the following drop-down menus.

- The ***Language used in Call Manager*** parameter specifies the language through which Call Manager panels display information.

  The *System Default* option refers to the default language as configured on your ShoreWare system.

- The ***Language used by voice mail prompts and IP phones*** specifies the language the system uses to display IP Phone messages and for voice mail audio prompts.

Step 4 Exit and Re-open Call Manager.

Section A.2.18 on page 173 describes the **Options and Preferences: Languages** panel.

2.4.2 Sound Preferences

You can configure Call Manager to play audio wav files when you receive a message or call. Specific events that can generate an audio alert include

- New Voice Message
- Incoming Call
- Incoming Instant Message
- Incoming Monitored Call
- Incoming Bridged Call Appearance
- Incoming Agent Call
- Queue Monitor Alert

To specify the wav files that Call Manager plays to signal an audio alert:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Sounds*** in the menu on the left side of the window.

Step 3 Select the desired event from the event table at the top of the window, located right of the menu.

Step 4 Press the ***Browse*** button to search for the desired wav file.

Section A.2.17 on page 173 describes the **Options and Preferences: Sounds** panel.

2.4.3 Configuring the External Number Prefix

The Trunk Access Code (TAC) is the prefix you must dial before entering a phone number when calling a device external to your ShoreWare system. The prefix that you dial depends on the trunk that routes your calls. Consult your system administrator for information about your system configuration.

To specify the Trunk Access Code that Call Manager uses to route your external calls:

Step 1 Open the Options and Preferences window by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select ***Options***.
- Right click the ShoreTel icon in the System Tray and select ***Options***.
- Press Ctrl+O.

Step 2 Select ***Telephony*** in the menu on the left side of the window.

Step 3 Select the desired prefix from the ***Prefix to dial external number*** drop-down menu.

Section A.2.11 on page 164 describes the **Options and Preferences: Telephony** panel.

CHAPTER 3

Accessing Call Manager

3.1 Call Manager Windows

Call Manager windows provide access to ShoreWare client services. In addition to initiating and managing communication sessions, you can view the presence of other users, adjust your presence, perform Workgroup and Contact Center functions, and access contact information, voice mail, and call history from these windows.

3.1.1 Window Types

Call Manager windows provide access to client application features, inform the user of incoming messages, and display communication session status. Call Manager windows include the Main Window, Satellite Windows, and Alerts.

3.1.1.1 Main Window

The Main window displays buttons, bars, and menus through which users view status, configure settings, manage voice mail, and initiate communication sessions. The title bar of the Main Window indicates the user's extension.

Figure 3-1 displays an example of the main window where the Viewing Mode is set to normal; refer to Section 3.2 on page 28 for Viewing Mode information. The title bar in the Call Manager window shown in Figure 3-1 indicates the user's extension is 2569.

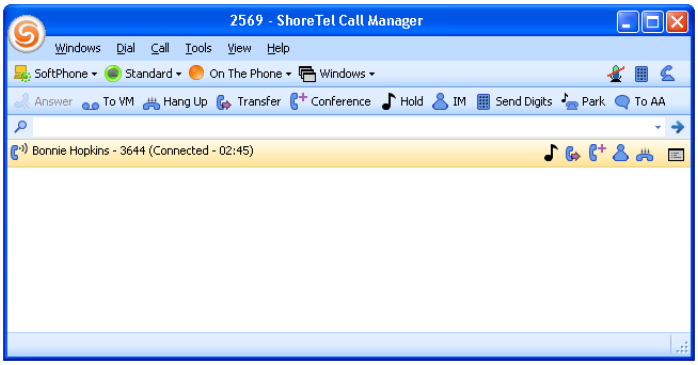

2569 - ShoreTel Call Manager
Windows Dial Call Tools View Help
SoftPhone Standard On The Phone Windows
Answer To VM Hang Up Transfer Conference Hold IM Send Digits Park To AA
Bonnie Hopkins - 3644 (Connected - 02:45)

Figure 3-1 Main Window in Normal View

The Main window structure and the set of menus available for display depend on the selected Viewing Mode.

3.1.1.2 Satellite Window

A Satellite window is a Call Manager component that

- displays Call Manager viewers.
- is separated from the Main Call Manager window.

When the Viewing option is set to Normal or Docked, Call Manager can be configured to display viewers either through the main window or through a satellite window. You can drag satellite windows into the Main Window content area or drag viewers in the Main window to create a Satellite window. Section 3.1.3 describes Call Manager window manipulation operations.

When the Viewing Option is set to Miniature, viewers are always displayed through a Satellite window.

Section 3.3 on page 30 describes Call Manager Viewers and includes a list of available viewers. A Satellite window can contain more than one viewer. Alternatively, a separate satellite window can be opened for each viewer.

The Satellite window in Figure 3-2 contains the Contacts viewer.

Figure 3-2 Call Manager Satellite window

3.1.1.3 Alerts

An Alert is a popup that Call Manager displays in the bottom right corner of the user's monitor to inform the user of an incoming voice call or instant message. Figure 3-3 displays a Voice Call Alert.

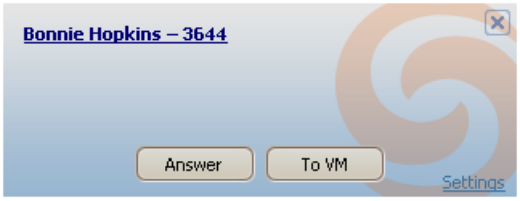


Figure 3-3 Voice Call Alert

Voice call alerts contain buttons for accepting the call or sending the call to Voice Mail. Clicking in an Instant Message alert opens the message panel from which the user can respond and continue the conversation. The function and appearance of alerts is the same for all viewing modes.

3.1.2 Window Components

The Call Manager Main window is the primary window for accessing ShoreWare client services. In addition to initiating and managing communication sessions, users can adjust their call handling mode or presence; view the presence of other system users; and access directory entries, calling history, and voice mail through this window.

Figure 3-4 displays the Call Manager Main window in normal viewing mode.

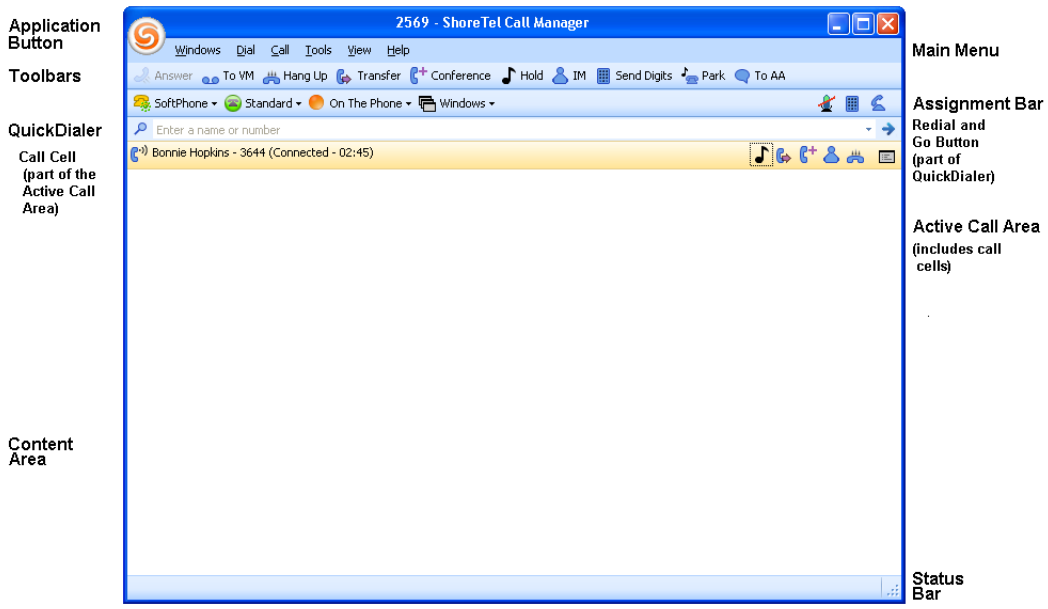

Application Button
Toolbars
QuickDialer
Call Cell (part of the Active Call Area)
Content Area
2569 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Answer To VM Hang Up Transfer Conference Hold IM Send Digits Park To AA
SoftPhone Standard On The Phone Windows
Enter a name or number
Bonnie Hopkins - 3644 (Connected - 02:45)
Main Menu
Assignment Bar
Redial and Go Button (part of QuickDialer)
Active Call Area (includes call cells)
Status Bar

Figure 3-4 Call Manager Main Window Components

3.1.2.1 Application Button

The Application Button appears as the ShoreTel logo in the upper left corner of the Main window. Click the Application Button to display menus that access communication session commands, configuration options, and parameter settings.

The Application Button is visible in Normal, Docked, and Miniature viewing modes.

3.1.2.2 Main Menu

The Main Menu is located below the title bar and above the Toolbars. Each word on the Main Menu accesses a drop down menu that displays commands, configuration settings, and viewing options. Main Menu options are also available through the Application Button.

To control the display of the Main Menu, select ***View -> Main Menu*** from the Application Button, the Main Menu, or the System Tray context menu.

The Main Menu is not available in Miniature viewing mode.

3.1.2.3 Assignment Bar

The Assignment Bar is located below the Toolbars and above QuickDialer. Each word on the left side of the Assignment bar accesses a drop down menu that lists options for assigning the user's access device, IM presence setting, and Call Handling Mode, and for displaying Viewers. Workgroup members also assign login status from the Assignment bar. All Assignment bar options are also available through the Application Button or the System Tray context menu.

The icons on the right side of the bar provides status for current Call Manager calls:

- The ***Microphone*** icon displays the mute status of the current call when you conduct calls through SoftPhone.
- The ***Keypad*** icon accesses a keypad through which dialing tones (DTMF) can be sent during active voice calls.
- The ***Telephone*** icon indicates the current call and on-hook phone status and lists the quantity of unanswered calls.

3.1.2.4 Toolbars

Toolbars provide single button access to Call Manager tasks. Call Manager can display up to ten toolbars and each toolbar has a maximum capacity of 24 buttons. Toolbars are configured by the system administrator.

Toolbars are an optional component of the Call Manager Main and Miniature windows. To control the display of the Toolbars, select ***View -> Show <toolbar name>*** from the Application Button, Main Menu, or the System Tray context menu.

3.1.2.5 QuickDialer

QuickDialer provides drop-down access to directory names and phone numbers that match the text in the data entry field. You can also enter, paste, or drag numbers into the QuickDialer field.

As shown in Figure 3-5, the right side of the QuickDialer field provides the following:

- **Redial button –** accesses a list of recent dialed or received calls, as configured in the **Options and Preferences: QuickDialer** panel.
- **Go arrow –** initiates a call to the selected contact in the QuickDialer field. Access to the Go arrow is configured in the **Options and Preferences: QuickDialer** panel.

Section A.2.2 on page 151 describes the Options and Preferences: QuickDialer panel.

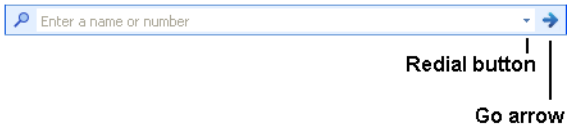


Figure 3-5 QuickDialer buttons

You can specify the following information when entering the intended call recipient in the ***QuickDialer*** data entry field:

- The recipient's name, as listed in your directory.
- The recipient's number as listed in your directory.
- A valid phone number, as specified by your system.
- Redial recently dialed numbers
- Company name
- Email address
- IM address
- Department name, as a name qualifier

As you fill the data entry field, Call Manager displays a drop down menu that lists the contents of your directory filtered by the QuickDialer contents. When you select a contact in this menu your phone initiates the call as specified by your telephony settings.

QuickDialer configuration options can prevent QuickDialer from displaying contact information for fax machines and companies. QuickDialer can also display available calling actions for filtered contacts. The Options and Preferences: QuickDialer panel configures these options.

QuickDialer tokens typed into the data entry field are matched to an index of directory entries. A drop down panel displays the a list of Directory entries filtered by the token matches.

QuickDialer properties include:

- Tokens are delimited by spaces:
  - **mark** is a single token string
  - **ma th** is a two token string
  - **m s w t** is a four token string
- Directory entries match a token string when each input token maps to a distinct word within the name of the entry, without regard to case or order:
  - **mark** matches ***Mark Thomason*** and ***Tim Markison***
  - **ma th** matches ***Marge Thorpe*** and ***Thad Martin***
- Each input token must match a word within the index name:
  - **p p** matches ***Pauline Paulus*** but not ***Peter Hicks***
- Parentheses, apostrophes, and hyphens are not considered when matching entries:
  - **one** matches ***O'Neal***
  - **tex** matches ***John (Tex) Jones***
- QuickDialer matches individual words within company names:
  - **net** matches ***High Country Networks***
- Only single token searches (strings with no spaces) match email and IM addresses
  - **mthomason@an** matches a user's (mthomason@anycorp.com – Mark Thomason) record.
- The Department field can be used to refine a Name search.
- In multiple token search, only the first token can match email addresses, IM addresses, or phone numbers.

3.1.2.6 Active Call Area and Call Cells

The Active Call Area displays call cells for each voice call that Call Manager is handling. The Active Call Area in Figure 3-4 contains one call cell. The Active Call Area can be configured to display the blank call cells by selecting ***Tools -> Options -> Preferences*** from the Application Button, Main Menu, or the System Tray context menu.

Call cells display status and time information about active calls that Call Manager is handling. Each call represents one call appearance. Operations available through main window buttons are performed on the highlighted call appearance. You can also perform operations on a call through a context menu by right clicking on the call cell.

The left side of a call cell indicates the status and duration of the connection with the other party on the call appearance, along with the name and number of that party. The right side of the call cell contains buttons for performing call management tasks on the call appearance. To determine the function of an individual button, hover the cursor above that button until Call Manager displays a popup description.

The Active Call Area in Figure 3-6 contains two call cells:

- The top cell corresponds to a call with Adam Pierce. The icon on the left side of the indicates that the call is currently connected to the device that is assigned to your extension. The text indicates the name and number of the other party and that the call is connected to the extension device. The buttons on the right side indicate the operations that can be performed on the call which are, respectively, ***Hold***, ***Transfer***, ***Conference***, ***Hang up***, and ***View Additional Information***. Because this call is

highlighted, call management operations initiated from Main Window menus are performed on this call.

The call cell indicates that AES-SRTP encryption is active during a call with a small padlock icon located next to the call status icon. The padlock icon indicates the call media is secure on the ShoreTel network; ShoreTel cannot guarantee call security outside of the network, such as calls that terminate across an analog or digital trunk.

- The bottom cell corresponds to a call with Hannah Poulson. As indicated by the status icon and text, this call is on hold. The set of operation buttons on the right side of the cell differ from those in the other cell because of the call state. The available buttons include ***Answer***, ***Conference***, ***Hang up***, and ***View Additional Information***. The call is not highlighted; clicking anywhere in the cell highlights the call.

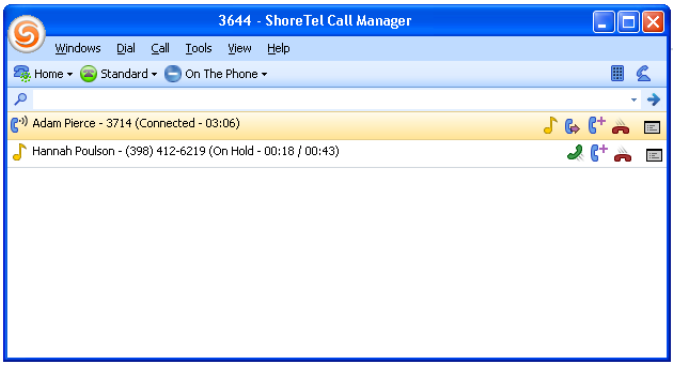

3644 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Home Standard On The Phone
Adam Pierce - 3714 (Connected - 03:06)
Hannah Poulson - (398) 412-6219 (On Hold - 00:18 / 00:43)

Figure 3-6 Call Cells in the Active Call Area

3.1.2.7 Content Area

Content Areas display one or more viewers, such as the Contact List or the Directory List. The Call Manager Main window may contain up to eight Content Area regions. Content regions can be dragged from the Main window into a Satellite window. Conversely, Satellite windows can be dragged into the Main window to create a Content Area.

3.1.2.8 Status Bar

The Status Bar is located at the bottom of the Call Manager window. The left side displays error and status messages.

3.1.3 Manipulating Call Manager Windows

Viewers can be displayed in the Call Manager Content Area or in Satellite windows. Users can incorporate Satellite windows into the Main window. Conversely, Viewers can be moved from the Call Manager window into Satellite windows.

The following procedure configures Call Manager to permit window manipulation:

Step 1 Open the Options and Preferences window by performing one of the following:

- Select ***Tools -> Options*** from the Main Menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options.**
- Press Ctrl+O.

Step 2 Select ***General*** in the menu on the left side of the window.

Step 3 Mark the ***Enable drag-and-drop Window arrangement*** checkbox.

By default, **Enable drag-and-drop Window arrangement** is enabled for Workgroup Agent, Workgroup Supervisor, and Operator type; this parameter is disabled for Personal and Professional Call Manager types.

3.1.3.1 Separating Windows

Drag and drop operations remove content areas from the Main window and separate viewers from a single Satellite window.

To separate panels from a tiled window, point the cursor at the Title Bar of the panel to be removed, left click and hold the left mouse button, then drag the panel outside of the window boundary.

To separate a panel from a tabbed window, point the cursor at the tab of the panel to be removed, left click and hold the mouse button, then drag the panel outside of the window boundary.

3.1.3.2 Combining Two Satellite Windows

Figure 3-7 displays a windows desktop that contains the Main window and two Satellite windows. The top satellite window contains the Contact List; the bottom Satellite window contains the Speed Dial list. The following procedure moves the Contact List into the Satellite window containing the Speed Dial List.

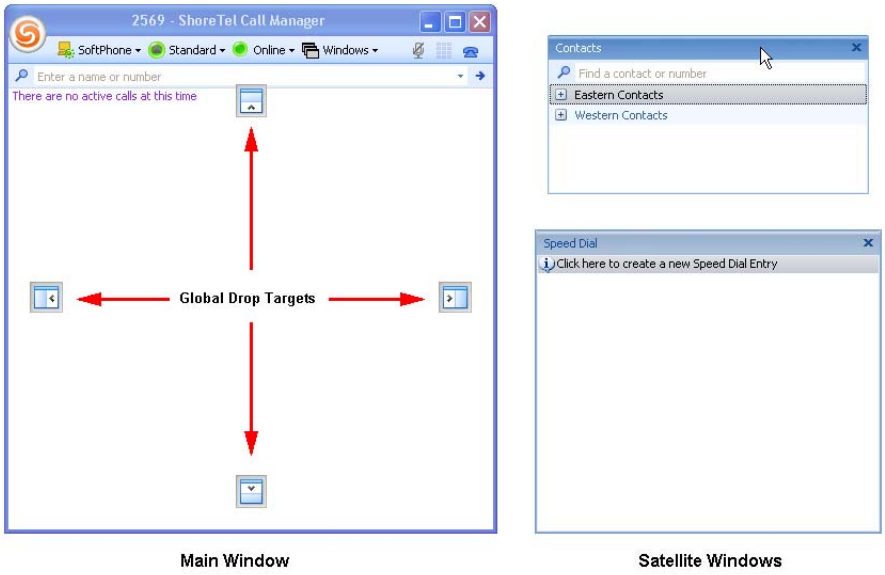


Figure 3-7 Call Manager Main and Satellite Windows

To combine two satellite windows:

Step 1 Point the mouse cursor at the Title Bar of the window to be moved, then click and hold the left mouse button. Figure 3-7 shows the cursor pointing on the Title Bar of the Contact List.

Moving the Satellite window displays Global Drop Targets in the Main window.

Step 2 Drag the window into the body of the receiving Satellite window. Figure 3-8 shows the Contact List as it is moved into the Satellite window containing the Speed Dial List.

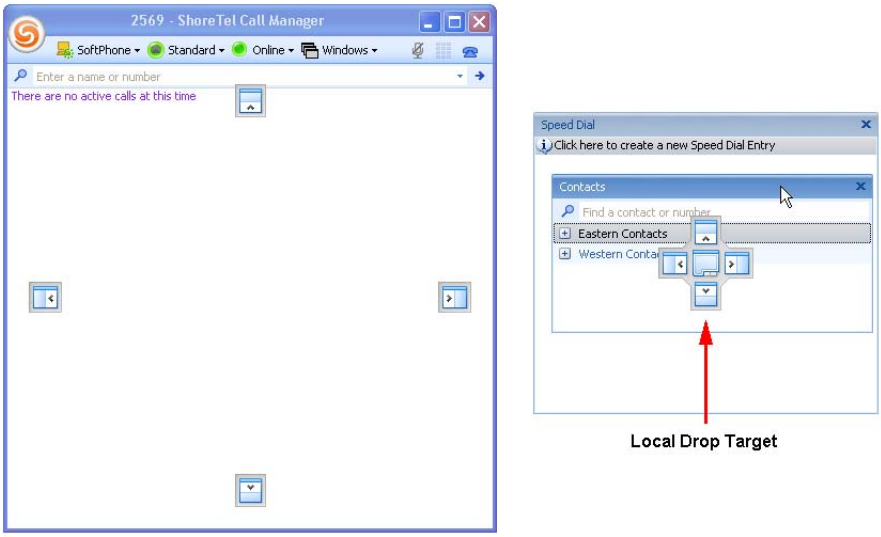


Figure 3-8 Moving a Satellite Window into another Satellite Window

As a window receives a Satellite window, it displays a local drop target, as shown in Figure 3-8. Local drop targets contain five icons – one in each of the protruding regions and one in the center. Each icon in the protruding regions represent an edge of the Satellite window.

Step 3 Hover the cursor over a selected drop target region until the receiving window displays a preview shadow. In Figure 3-9, the cursor is hovering over the bottom drop target icon.

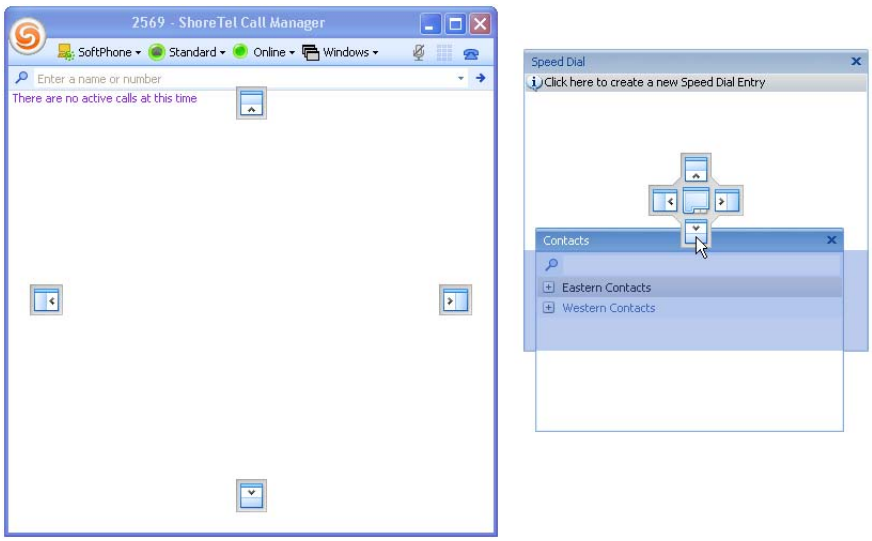


Figure 3-9 Hovering over the Bottom Drop Target Icon

The shaded area represents the proposed position of the Contact List within the receiving Satellite window.

Step 4 Release the Mouse button.

Figure 3-10 displays the Satellite window that results from releasing the mouse button while hovering on the bottom drop target, as shown in Figure 3-9. The global drop targets in the Main window disappear when the mouse button is released.

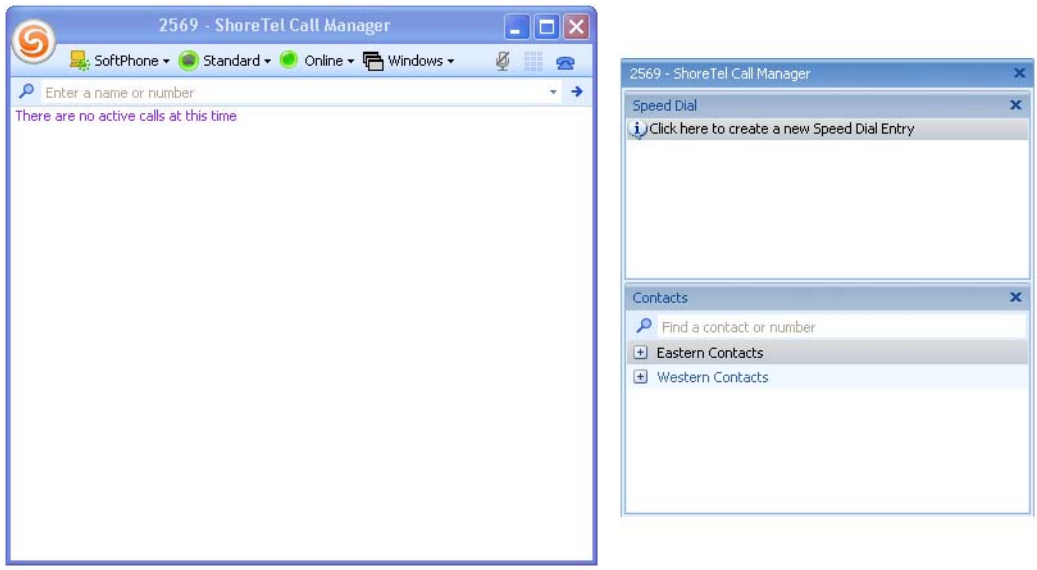


Figure 3-10 Tiled Viewers within a Satellite window

Releasing the mouse while hovering over protruding drop target icons results in the Satellite window displaying the viewers as tiled panels, as shown in Figure 3-10. Releasing the mouse while hovering over the center drop target icon results in the Satellite window displaying the viewers as tab panels, as shown in Figure 3-11.

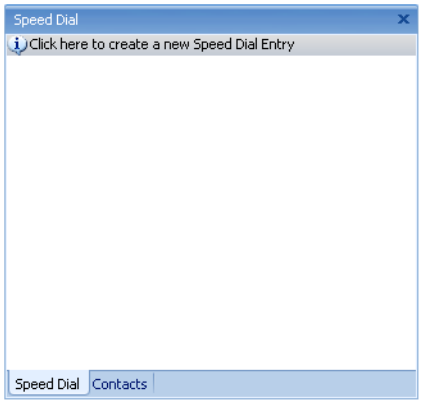
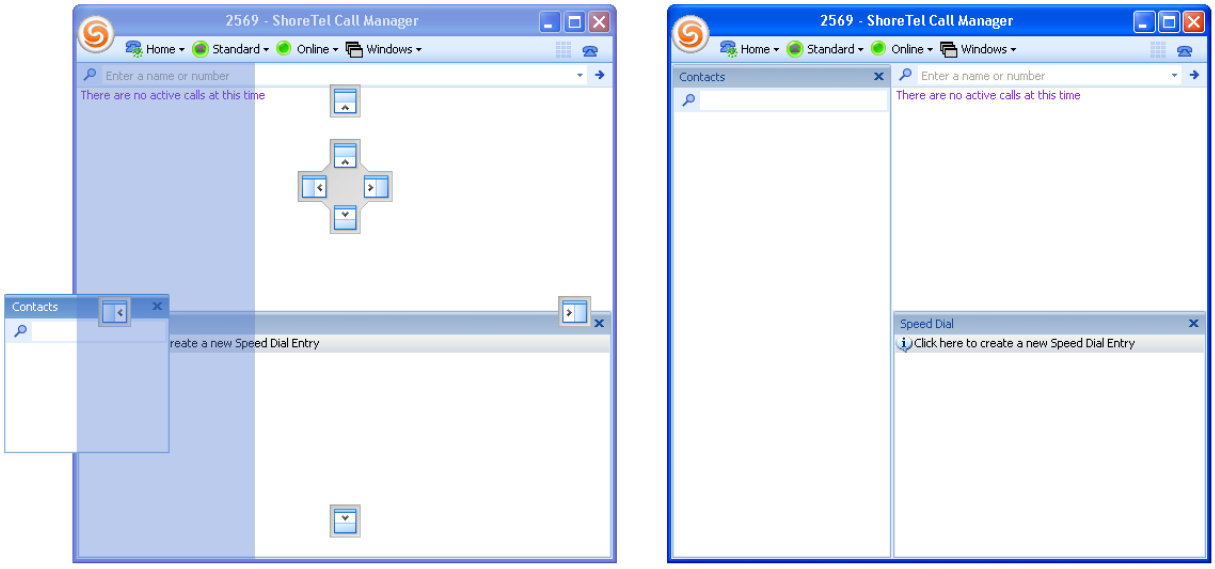


Figure 3-11 Tabbed Viewers within a Satellite Window

3.1.3.3 Moving a Satellite Window into the Main Window

The procedure for moving a Satellite window into the Main window is similar to that for combining two Satellite windows. When moving panels into the Main window, two sets of drop targets appear. The outer targets are used for adding a content area to the window. The interior drop targets are used to incorporate the added panel into an existing content area.

Figure 3-12 depicts the result of hovering the Satellite window over a global drop target. The window panel is inserted into the entire Call Manager Main window.

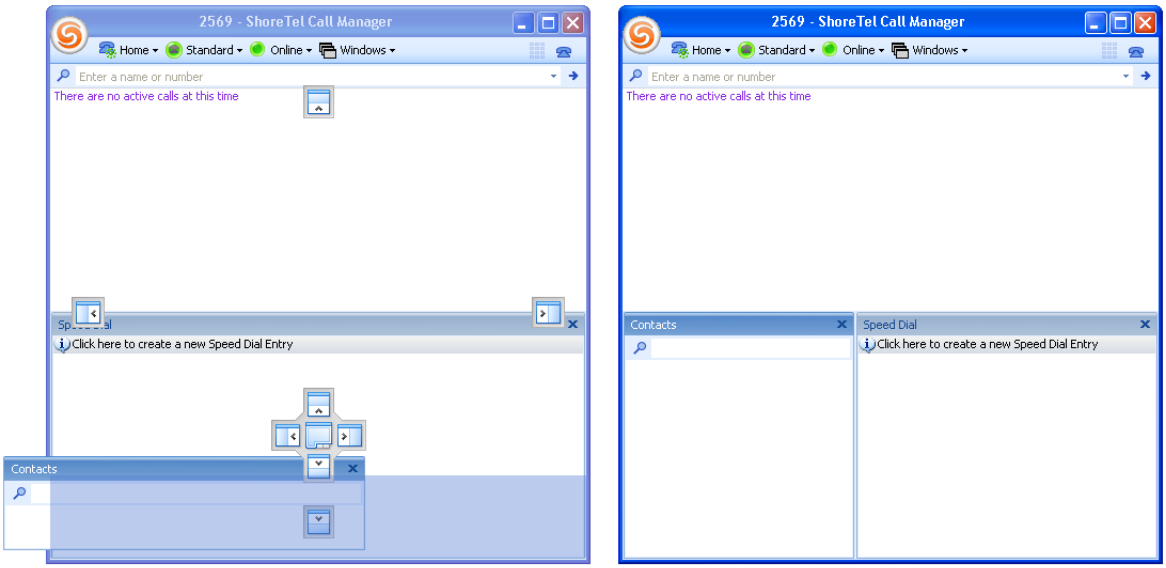


Hovering over global drop target

Result of Hovering over global drop target

Figure 3-12 Hovering over Global Drop Targets

Figure 3-13 depicts the result of hovering the Satellite window over a local drop target. The window panel is inserted only into the Content Area of the Main window.



Hovering over local drop target

Result of Hovering over local drop target

Figure 3-13 Hovering over Local Drop Targets

3.2 Viewing Modes

Call Manager provides three viewing modes for displaying the Main Call Manager window: Normal, Miniature, and Docked. When Call Manager is opened, it maintains the viewing option setting that was active when it was closed.

When Call Manager is active but not visible on the desktop, the System Tray displays a ShoreTel icon which, when pressed, opens the Call Manager window.

3.2.1 Normal Mode

The Normal Call Manager window, shown in Figure 3-1, can be configured to contain all Call Manager window components. The Normal window can be moved anywhere on the desktop by dragging the title bar. To resize the width and length of the Normal window, click and drag any of the four window edges.

To display the Main Manager in Normal mode, select *View -> Normal* from the Menu bar, Application Button, or the System Tray context menu.

Moving viewers between the Main window and satellite windows requires that the Windows Manipulation option is enabled, as described in Section 3.1.3 on page 24.

3.2.2 Miniature

The Miniature view, shown in Figure 3-14, is a compact version of the main window. The Miniature view always displays the Application Button, QuickDialer, and Call List. The Call Toolbar is accessed in Miniature mode through a Application Button option. All viewers are accessible through a Satellite window.

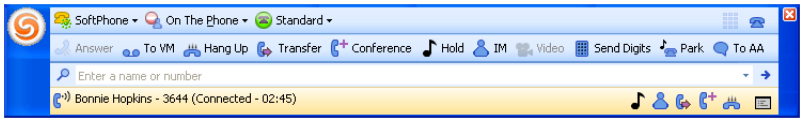


Figure 3-14 Call Manager Window – Miniature View

To display the Main Window in Miniature view, select *View -> Miniature* from the Menu bar, Application Button, or the System Tray context menu.

To move the Miniature Main Window, click and hold in the dark blue region on the left or right side of the window, then drag it to the desired location.

3.2.3 Docked

Call Manager provides four Docked window settings, one for each edge of the computer monitor. When Call Manager is docked, it is located permanently on the edge of the window specified by the docking command. In Figure 3-15, Call Manager is docked to the bottom of the monitor.

- **When Call Manager is docked to the left or right side**, the window spans the monitor from top to bottom. The width is adjustable. The viewers can appear either in the Main Call Manager window or in Satellite windows.
- **When Call Manager is docked to the top or bottom of the monitor**, the height of the window is fixed and the window spans the monitor from the left to right sides. Viewers only appear in Satellite windows.

To display Call Manager in Docked view, select *View* from the Menu bar, the Application Button, or the System Tray context menu, then select one of the Docked options at the bottom of the menu.

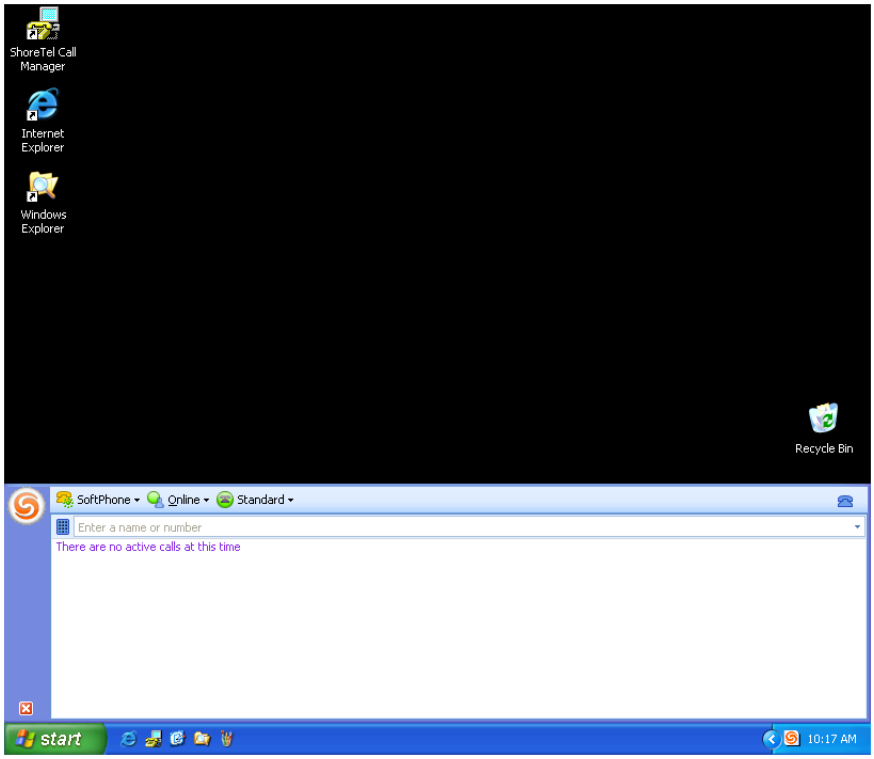


Figure 3-15 Call Manager Window – Docked Bottom

3.2.4 System Tray

The System Tray displays a ShoreTel icon when Call Manager is running, even when the Call Manager window is not on the desktop or referenced on the taskbar. Clicking the ShoreTel icon opens the Call Manager window on the desktop and returns focus to the window. Right clicking the System Tray icon opens a context menu that displays most options available through the Application Button.

Figure 3-16 displays the ShoreTel icon in the System Tray.

Figure 3-16 Call Manager Icon in the System Tray

3.3 Viewers

Viewers are lists that display resources available through Call Manager including your voice mail, contacts, directory lists, speed dial contacts, and call history. You access Viewers through the Content Area of the Main window or through a Satellite window.

The following is a summary of the Call Manager viewers. A complete description of each panel is provided in the referenced sections.

- **Directory**: The Directory viewer displays all contact information for all system users. You can store personal contacts and import contact entries from Microsoft Outlook to the Directory viewer. Section 8.2 on page 87 describes the Directory Viewer.

- **Contacts:** The Contact viewer displays your contact lists. Contact lists provide convenient access to selected entries from your directory of addresses. Section 8.3 on page 92 describes the Contacts Viewer.
- **History:** The History viewer displays information about previous calls you made and received. It can be used to display calls you made and the phone numbers of people who called you. Section 4.9 on page 68 describes the History Viewer.
- **Voice Mail:** The Voice Mail viewer manages your voice messages. In addition to viewing your messages, you can listen to, sort, and delete messages from this panel. Section 9.3 on page 109 describes the Voice Mail viewer.
- **Speed Dial:** The Speed Dial viewer manages and initiates calls to your speed dial contacts. Section 8.5.1 on page 104 describes the Speed Dial viewer.
- **Queue Monitor:** The Queue Monitor displays the calls that are ringing into your workgroups and waiting on your workgroup queues. Section 10.4.1 on page 127 describes the Queue Monitor.
- **Agent Monitor:** The Agent Monitor displays the name, extension, and status of all agents in your workgroups. Section 10.4.2 on page 129 describes the Agent Monitor.
- **Bridged Call Appearance Monitor:** The Bridged Call Appearance Monitor displays the Bridged Call Appearances for which your phone is configured to answer. Section 10.4.3 on page 131 describes the Bridged Call Appearance Monitor

CHAPTER 4

Voice Calls

4.1 Introduction

Call Manager provides a Graphical User Interface for initiating and handling your voice calls. Call Manager operations and features that support, handle, and manage your voice calls include:

- extension assignment to a device
- configuring call device options
- initiating a voice call
- managing incoming calls
- operations during an active call
- specialty calls: conference, video, intercom, and pages
- history viewer
- call routing slips

4.2 Extension Assignment

Extension assignment specifies the device to which ShoreWare routes your calls. The following sections explain the options for receiving calls at your default home device, at your SoftPhone, or at other devices through Office Anywhere.

The Device button on the Assignment bar displays the audio device that is currently assigned to the user's extension.

4.2.1 Home Device

Your **home device** is the phone that is plugged into your home port, as configured by your administrator. The home device can only be changed by your system administrator.

To assign your Home Device to your extension, perform one of the following:

- Click the Application Button and select ***Extension Assignment -> Home.***
- Click the Assignment Button on the Assignment Bar and select ***Home***.
- Right click the ShoreTel icon in the System Tray and select ***Extension Assignment -> Home.***
- Press Ctrl+Shift+M.

  The Assignment button displays the Home icon to indicate that your extension is assigned to your home device.

4.2.2 SoftPhone

SoftPhone is a Call Manager component that performs voice calls and voice mail functions directly through the computer running Call Manager. After users assign their extension to SoftPhone, they use the computer's audio devices to place or receive voice calls and send or receive voice messages. SoftPhone is a licensed feature that requires administrator authorization.

Chapter 7 on page 85 describes SoftPhone.

To assign SoftPhone to your extension, perform one of the following:

- Click the Application Button and select ***Extension Assignment -> SoftPhone.***
- Click the Assignment Button on the Assignment Bar and select ***SoftPhone***.
- Right click the ShoreTel icon in the System Tray and select ***Extension Assignment -> SoftPhone.***
- Press Ctrl+Shift+S.

  The Assignment button displays the SoftPhone icon to indicate that your extension is assigned to the SoftPhone.

4.2.3 Office Anywhere

4.2.3.1 Description

Office Anywhere is an extension assignment option that forwards calls to a designated system device or a remote telephone connected to the PSTN. Office Anywhere requires authorization from your administrator.

Activating Office Anywhere from a system telephone assigns your extension to that device. When activating Office Anywhere from a remote device, you maintain an on-system extension presence by mapping your ShoreWare extension to the external device.

Call Manager displays calls that Office Anywhere forwards to your specified device. You can manage these calls in Call Manager as if you received them through your home device.

- The device to which Office Anywhere assigns your extension rings when you receive a call. The active Call Handling Mode determines the disposition of unhandled calls.
- Call Manager provides all call management functions except call answer. Office Anywhere calls must be answered on the assigned device.
- Voice calls made and received while Office Anywhere is active are placed in the extension's call stack. Calls cannot be parked on an extension where Office Anywhere is active.

4.2.3.2 Activating Office Anywhere

To assign your extension to a device specified by Office Anywhere, perform one of the following:

- Click the Application Button and select ***Extension Assignment -> Office Anywhere.***
- Click the Assignment button on the Assignment Bar and select ***Office Anywhere***.
- Right click the ShoreTel Tray icon and select ***Extension Assignment -> Office Anywhere***
- Press Ctrl+Shift+O
- Select ***Enable Office Anywhere*** from the **Options and Preferences: Office Anywhere** panel, as described in Section A.2.5 on page 156.

The Office Anywhere option is not available until a phone number is entered into the External Number field located on the **Options and Preferences: Office Anywhere** panel.

When Office Anywhere is active, the Assignment button displays the telephone number of the assigned device.

You specify the phone number of the assigned Office Anywhere device on the **Options and Preferences: Office Anywhere** panel, as described in Section A.2.5 on page 156.

4.2.3.3 Configuring Office Anywhere

The **Options and Preferences: Office Anywhere** panel specifies the Office Anywhere device, configures other Office Anywhere settings, and activates Office Anywhere for your extension.

Section A.2.5 on page 156 describes the **Options and Preferences: Office Anywhere** panel.

4.3 Configuring Device Options

4.3.1 Handsfree Mode

Handsfree mode defines a telephone state where the phone is always off hook and the dial tone is suppressed. This mode clears the audio path immediately at the conclusion of a call, allowing you to initiate a call without hanging up the phone from a previous call. Although Handsfree mode is typically used with a headset, this parameter is independent of the active audio path.

To access the Handsfree mode activation parameter:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Telephony*** in the menu on the left side of the window.

Step 3 Select the preferred handsfree mode option by setting ***Suppress dial-tone when off-hook (headset mode for analog phones)*** as follows:

- Check ***Suppress dial-tone when off-hook (headset mode for analog phones)*** to enable Handsfree mode.
- Clear ***Suppress dial-tone when off-hook (headset mode for analog phones)*** to disable Handsfree mode.

Section A.2.11 on page 164 describes the **Options and Preferences: Telephony** panel.

4.3.2 Call Stack Size

The call stack size determines the maximum number of calls that you can handle through Call Manager. Calls that you receive while your call stack is full are managed as busy. The call stack size configured through Call Manager is subject to the maximum size configured for your extension by the System Administrator. Consult your System Administrator to increase maximum call stack size for your extension.

When your call stack is full, Call Manager permits one additional outbound call for performing consultative conferences and transfers.

To configure your call stack size

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the Call Manager icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Telephony*** in the menu on the left side of the window.

Step 3 Enter the call stack size in the **Maximum number of active calls to show** field.

Section A.2.11 on page 164 describes the **Options and Preferences: Telephony** panel.

4.3.3 Specifying the Auto Off-Hook Device

The Automatic Off-Hook Preference specifies the audio path that the system activates when you place or receive a voice call. SoftPhone and several ShorePhone models support Automatic Off-Hook Device selection.

To configure the Off-Hook audio path preference:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the Call Manager icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Telephony*** in the menu on the left side of the window.

Step 3 Select the preferred audio path by setting ***Default audio path for automatic off-hook***:

- **Speaker:** The speaker and external microphone on your active device is the default audio path.
- **Headset:** The headset on your active device is the default audio path.
- **Wireless Headset:** The wireless headset on your active device is the default audio path.
- **Bluetooth:** The Bluetooth headset is the default audio path on phones that support Bluetooth.

Section A.2.11 on page 164 describes the **Options and Preferences: Telephony** panel.

4.3.4 Suppressing the Call Waiting Tone

The Call Waiting Tone is a signal inserted into the audio path during a voice call to alert you of an inbound call. Suppressing the call waiting tone prevents your receipt of this signal. Calls that you receive when the Call Waiting Tone is suppressed are handled as specified by your active call handling mode. This parameter setting does not affect Voice mail and call handling mode settings.

To access the Call Waiting mode suppression parameter:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the Call Manager icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Telephony*** in the menu on the left side of the window.

Step 3 Select a call waiting tone option by setting ***Suppress call waiting tone for subsequent calls*** as follows:

- Select ***Suppress call waiting tone for subsequent calls*** to disable the tone.
- Clear ***Suppress call waiting tone for subsequent calls*** to activate the tone.

Section A.2.11 on page 164 describes the **Options and Preferences: Telephony** panel.

4.4 Making a Call

You can initiate voice calls from the Main window and from Viewers that display contact names or numbers. This section contains procedures for initiating calls from QuickDialer, the Make New Call panel, and from Call Manager viewers.

To initiate a call by selecting a name or number from the QuickDialer drop down menu:

Step 1 Perform one of the following:

- Begin entering the contact name or number in the data entry field.
- Press the Redial icon located on the right side of the data entry field.

Refer to Figure 4-1 for the location of the QuickDialer components. Section 3.1.2.5 on page 22 describes QuickDialer.

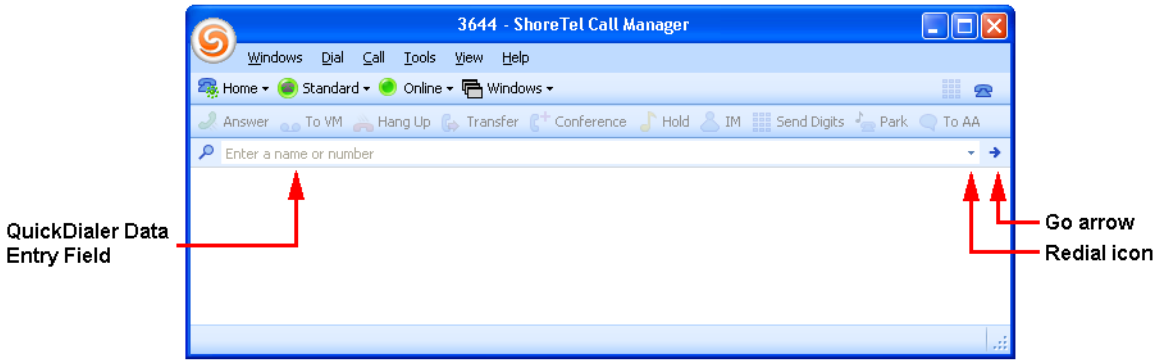

3644 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Home Standard Online Windows
Answer To VM Hang Up Transfer Conference Hold IM Send Digits Park To AA
Enter a name or number
QuickDialer Data Entry Field
Go arrow
Redial icon

Figure 4-1 QuickDialer Components

Step 2 Select the desired contact in the drop-down menu.

Step 3 Double click the menu entry, press the Enter key, or click the Go arrow.

To initiate a voice call through the Make New Call panel:

Step 1 Perform one of the following:

- Right click in the Active Call Area and select ***Make Call***.
- Select ***Dial -> Make Call*** from the Main Menu.

- Click the Application Button and select ***Dial -> Make Call***.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Make Call***
- Press Ctrl+Alt+D

Call Manager displays the **Make New Call** dialog box, as shown in Figure 4-2.

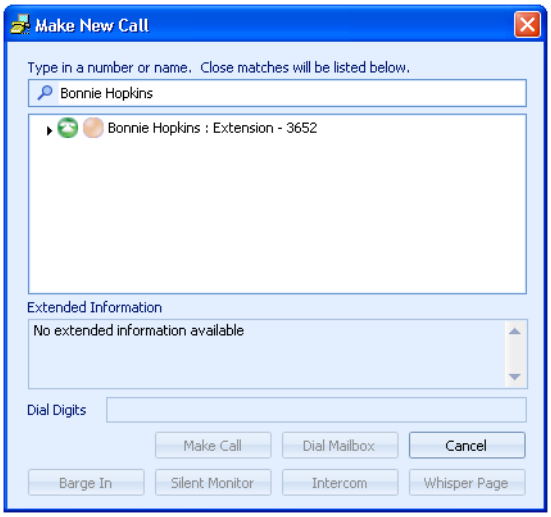


Figure 4-2 Make New Call panel

Step 2 Begin entering the call recipient's name or number in the data entry field at the top of the panel.

The table lists entries from your directory, filtered by data entry field contents.

Step 3 Select the desired recipient in the table.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the number to be dialed after you select a table entry.

Step 4 Press the **Make Call** button at the bottom of the panel.

To initiate a call from a specific Call Manager Viewer, refer to the manual section that describes that viewer.

4.5 Managing Incoming Calls

4.5.1 Inbound Call Signals

Call Manager provides three methods of signaling the receipt of an inbound voice call:

- Display a Call Alert in the bottom right corner of your monitor

  You control the display of Call Alerts from the Options and Preferences: Telephony panel, as described in Section A.2.1 on page 151. Call Alerts are described in Section 3.1.1.3 on page 20.

- Play an audible tone through your computer.

  You can select the tone that your computer plays from the Options and Preferences: Sounds panel, as described in Section A.2.17 on page 173.

- Display a call cell in the Active Call Area of the Main Window.

Section 3.1.2.6 on page 23 describes call cells.

4.5.2 Answering Calls

4.5.2.1 Answering Calls to your Extension

When you receive a call, the Active Call Area displays a call cell that lists the caller's telephone number. The call cell also lists the caller's name if the number is listed in your system's directory, personal directory, or Outlook contacts. If the inbound call number matches multiple names in your directories, the call cell displays the first match.

To answer an incoming call from Call Manager, perform one of the following:

- Click the Answer button on the call alert
- Click the Answer button on the call cell.
- Right click the call cell and select ***Answer***.
- Select ***Call -> Answer*** from the main menu.
- Click the Application Button and select ***Call -> Answer.***
- Right click the Call Manager icon in the System Tray and select ***Call -> Answer***.
- Press Ctrl+A
- Press F8

4.5.2.2 Answering Calls to a Different Extension

Authorized users can answer inbound calls to another user's extensions.

To pick up another user's phone call:

Step 1 Perform one of the following:

- Select ***Dial -> Pickup/Unpark*** from the Main Menu.
- Click the Application Button and select ***Dial -> Pickup/Unpark***.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Pickup/Unpark***
- Press Ctrl+Alt+P

Call Manager displays the Pickup dialog box, as shown in Figure 4-3.

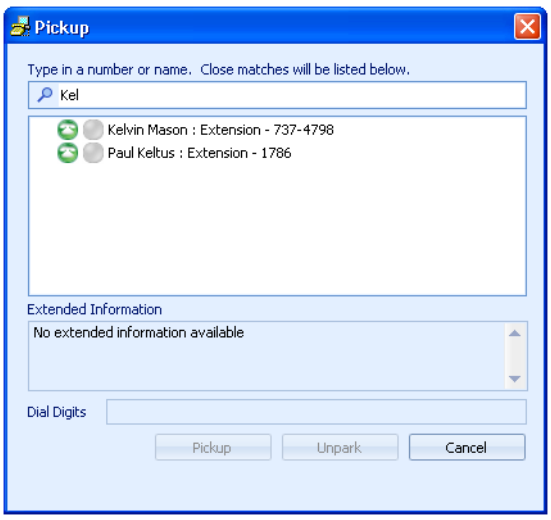


Figure 4-3 Pickup panel

Step 2 Begin entering the user's name or number in the data entry field at the top of the panel.

The table displays a list of user names, filtered by data entry field contents.

Step 3 Select the desired user in the table.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the user's number after you select a table entry.

Step 4 Press the **Pickup** button at the bottom of the panel.

4.5.2.3 Answering the Night Bell Extension

The Night Bell is an extension that is tied to a site-wide signaling device and can be answered by authorized users.

To pick up a night bell call, perform one of the following actions:

- Select ***Dial -> Pick up Night Bell*** from the Main Menu.
- Click the Application Button and select ***Dial -> Pick up Night Bell***.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Pick up Night Bell***
- Press Ctrl+Alt+L

4.5.3 Rerouting Inbound Calls

4.5.3.1 Sending a Call to Voice Mail

Call Manager can send your inbound calls to Voice Mail.

To send an inbound call to Voice Mail, perform one of the following:

- Click the Application Button and select ***Call -> To Voice Mail.***
- Select ***Call -> To Voice Mail*** from the main menu.
- Click the *To VM* icon on the call cell
- Right click the call cell and select ***Call -> To Voice Mail.***
- Press Ctrl+Y.

4.5.3.2 Sending a Call to the Automated Attendant

Call Manager can send your inbound call to the Automated Attendant.

To send an inbound call to the Automated Attendant, perform one of the following:

- Click the Application Button and select ***Call -> To Auto Attendant.***
- Select ***Call -> To Auto Attendant*** from the main menu.
- Right click the call cell and select ***Call -> To Auto Attendant.***

4.5.3.3 Transferring a Call to a Directory Contact

Call Manager can send your inbound call to one of your Directory contacts. The Call Transfer function, including the transfer of active calls, is described in Section 4.6.3 on page 53.

To send an inbound call to a Directory contact:

Step 1 Perform one of the following:

- Click the Application Button and select ***Call -> Transfer.***
- Select ***Call -> Transfer*** from the main menu.
- Right click the call cell and select ***Call -> Transfer.***

Call Manager displays the **Transfer Call** dialog box.

Step 2 Enter the contact name or number in the data entry field at the top of the dialog box.

The table displays a list of directory entries filtered by data entry field contents.

Step 3 Select the desired user in the table.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the user's number after you select a table entry.

Step 4 Press the button at the bottom of the panel corresponding to your desired transfer type.

4.5.4 Automated Call Handling

A Call Handling Mode defines call management conditions and tasks for your inbound calls. ShoreWare defines the following five call handling modes for each extension to customize the manner that a user's calls are handled over a variety of situations.

- Standard
- In a Meeting
- Out of Office
- Extended Absence
- Custom

One call handling mode is always active. ShoreWare automatically selects the active call handling mode on the basis of system schedules maintained by the system administrator. Users can also manually select their active call handling mode.

The following sections describe call management tasks controlled by Call Handling Modes, along with the automatic and manual methods of selecting the active call handling mode.

4.5.4.1 Configuring the Call Handling Modes

Mode Configuration panels configure call handling methods when the specified call handling mode is active. The Option and Configuration window provides access to five Call Handling Mode configuration panels, one for each call handling mode.

Section A.2.4 on page 154 describes the Call Handling Mode configuration panels.

4.5.4.2 Setting the Active Call Handling Mode

The active Call Handling Mode specifies the manner by which Call Manager handles your inbound calls. ShoreWare automatically activates call handling modes, as specified by system schedules maintained by the administrator. You can also manually select the active call handling mode.

Automatic Mode Selection

A ShoreWare schedule is a software component that specifies a set of time periods. Call Manager uses schedules to program call handling mode changes for system users.

Each schedule consists of a name and a list of day-time intervals. Call Manager panels refer to the schedule by its name and specify an active call handling mode during the intervals.

ShoreWare defines three schedule types:

- **On-hour schedules:** On-hour schedules specify day and time intervals over a weekly period without referencing a specific date. Figure 4-4 displays three examples of On-hour schedules.

Day Shift		Afternoon Shift		Weekend Shift	
Monday	8:00 am - 5:00 pm	Monday	1:00 pm - 10:00 pm	Saturday	8:00 am - 12:00 pm
Tuesday	8:00 am - 5:00 pm	Tuesday	1:00 pm - 10:00 pm	Sunday	8:00 am - 12:00 pm
Wednesday	8:00 am - 5:00 pm	Wednesday	1:00 pm - 10:00 pm		
Thursday	8:00 am - 5:00 pm	Thursday	1:00 pm - 10:00 pm		
Friday	8:00 am - 5:00 pm	Friday	1:00 pm - 10:00 pm		

Figure 4-4 On-Hour Schedule Examples

- **Holiday schedules:** Holiday schedules specify dates. Periods that identify a year are valid once; periods that do not specify a year are valid each year on the listed dates. Holiday schedules take precedence over On-hour schedules during periods covered by each schedule. Figure 4-5 display examples of Holiday Schedules.

Holiday 1	Holiday 2
1/1	1/1
5/26/2008	2/18/2008
7/4	3/17
11/27/2008	7/4
11/28/2008	9/1/2008
12/25	11/27/2008
	11/28/2008
	12/25

Figure 4-5 Holiday Schedule Examples

- **Custom schedules:** Custom schedules specify date and time intervals. Periods that identify a year are valid once; periods that do not identify a year are valid each year on the listed dates. Custom schedules take precedence over On-hour and Holiday schedules during periods listed by multiple schedules. Figure 4-6 display examples of Holiday Schedules.

Custom 1		Custom 2	
6/14/2008	9:00 am - 4:00 pm	2/5/2008	12:00 am - 12:00 pm
7/24	6:00 am - 9:00 pm	2/6/2008	12:00 am - 12:00 pm
		2/7/2008	12:00 am - 12:00 pm

Figure 4-6 Custom Schedule Examples

Schedules are configured by the system administrator. To determine the periods specified by an individual schedule, consult your system administrator.

Default active call handling modes are managed through the Schedule parameter of the Call Handling Mode configuration panels:

- The **Standard** and **Out of Office** modes determine the active call handling mode during normal daily activities.
  - The available options in **Standard**'s schedule parameter are the *On-hour* schedules configured by the system administrator. The user's active call handling mode is **Standard** during the times listed by the selected schedule unless the user manually changes the mode.

— The **Out of Office** schedule is the inverse of the selected schedule in the **Standard** Call Handling Mode preferences panel. The user's active call handling mode is **Out of Office** during all periods not covered by the On-hour schedule.

Schedules are not selected in the **Out of Office Call Handling Mode** preferences panel.

Example: Assume that *Day Shift* in Figure 4-4 is the selected schedule in the **Standard** Call Handling Mode panel. **Standard** is the default call handling mode between 8 am to 5 pm on Mondays through Friday. **Out of Office** is the default call handling mode all other times.

- The user's active call handling mode is **Extended Absence** during the times listed by the selected Holiday schedule unless the user manually changes the mode. The Schedule drop down menu on the Extended Absence call handling mode preferences panel lists the Holiday schedules configured by the administrator.
- The user's active call handling mode is **Custom** during the times listed by the selected Custom schedule unless the user manually changes the mode. The Schedule drop down menu on the Custom call handling mode Preferences panel lists the Custom schedules configured by the administrator.
- **In a Meeting** mode is not associated to a schedule and cannot become active through an automatic mode selection.

Manual Mode Transitions

You can select the active call handling mode through Call Manager. A selected call handling mode remains active until you manually select a different mode or an automatic mode transition is performed, as scheduled by the mode configuration panels.

To change the active call handling mode, perform one of the following:

- Modify the ***Current call handling mode*** setting on the **Options and Preferences: Call Handling Mode** panel, as described in Section A.2.3.
- Click the Call Handling Mode button on the Assignment bar and select the desired mode from the drop down menu.
- Press the hot key combination for the desired mode:
  - — Press Ctrl+Shift+1 for Standard Mode.
  - — Press Ctrl+Shift+2 for In a Meeting Mode.
  - — Press Ctrl+Shift+3 for Out of Office Mode.
  - — Press Ctrl+Shift+4 for Extended Absence Mode.
  - — Press Ctrl+Shift+5 for Custom Mode.

4.5.4.3 Call Handling Mode Warnings

Call Manager can be programmed to warn you if the following Call Handling conditions are present when you start Call Manager:

- The **Current Call Handling Mode** is not ***Standard***.
- The **Forward Calls** setting for Standard Call Handling Mode is ***Forward Always***.

These parameters are set from the **Options and Preferences: Call Handling Mode** panel, as described in Section A.2.3.

4.5.4.4 Call Handling Mode Delegation

Call Handling Mode Delegation permits the change of a user's current call handling mode by other users. Call Handling Mode delegation permissions are managed from the following locations:

- Options and Preferences: Call Handling Mode panel.
- ShoreWare Director – requires system administrator access.

Users modify another user's current call handling mode through the following tools:

- **Operator Call Manager**, by right clicking a user in the Contact Viewer.
- **Web Access Client**, by selecting *Other -> CHM Delegation*.

To add a user to the delegation authorization list:

Step 1 Open the **Options and Preferences: Call Handling Mode** panel, as shown in Figure 4-7.

Step 2 Enter the name or address of the contact to be granted call handling mode delegation authorization in the data entry field below **Allow these users to change current call handling mode.**

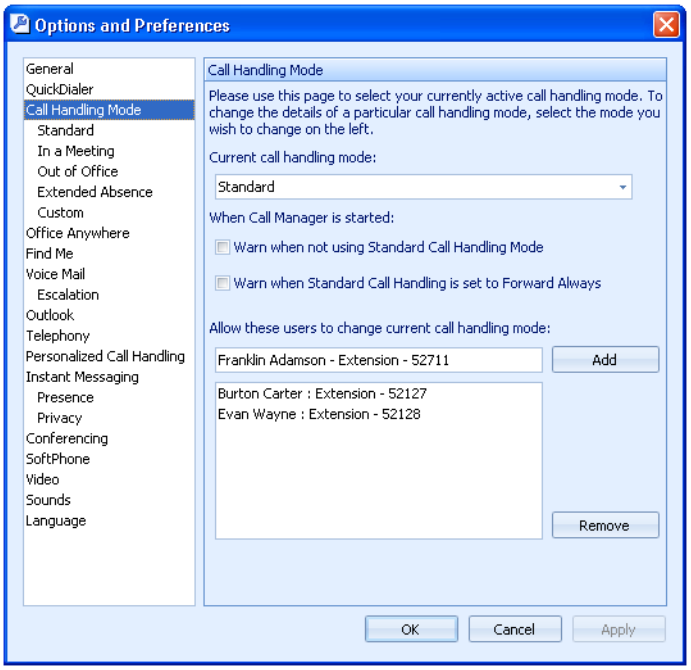


Figure 4-7 Changing Call Handling Mode Delegation users

Step 3 Press the Add button located right of the data entry field.

To delete a highlighted user from the authorization list, press the Remove button.

4.5.5 Personalized Call Handling

Personalized Call Handling defines flexible handling methods for inbound calls from different callers received at various times and dates. Possible applications for Personalized Call Handling includes:

- Requiring unidentified callers to announce their name by routing them to ***Announced Find Me***.
- Assigning different ringtones for selected callers, such as family, personal contacts, external contacts.
- Routing calls from non urgent sources directly to voicemail or to other extensions.

Personalized Call Handling filters and manages inbound calls on the basis of multiple criteria including time or date calls are received, end user status, and caller identity. Personalized Call Handling is implemented through *Call Routing Plans* and *Call Routing Rules*:

- The **call routing plan** specifies a user's call handling method. The plan prioritizes a list of enabled Call Handling Rules.
- **A call handling rule** is the base unit of a Call Routing Plan that consists of a condition and action. When a call handling rule is active and the condition is satisfied, the action specifies method by which the ShoreTel system handles the user's call.

Section A.2.12 describes the User Interface panel that configures Personalized Call Handling.

4.5.5.1 Licensing

Personalized Call Handling is available to all System Users that are authorized for the following Call Manager types:

- Professional
- Operator
- Workgroup Agent
- Workgroup Supervisor

Administrator authorization is not required for user assigned to these Call Manager types.

4.5.5.2 Description

A Call Routing Plan manages a user's inbound voice calls. The plan consists of call handling rules, each of which specifies a method of handling a call when a condition set is valid. The plan enables and prioritizes selected rules. The user's inbound calls are evaluated against the call handling rules. The highest priority rule with conditions that are satisfied define the handling method for the call.

The call routing plan takes precedence over the active Call Handling Mode.

This section describes the structure and call handling rules, followed by a discussion of creating a call routing plan from these rules.

Call Handling Rules

Call handling rules are the Personalized Call Handling components that define evaluation conditions and handling action. When the rule is active and the condition is satisfied, the action determines how the call is handled.

Three components comprise a call handling rule: name, condition, and action. The following sections describe call handling rule components.

- **Name:** The name is the label by which Call Manager and Director refers to a call handling rule. Users specify the name when they create the rule.

- **Condition:** The condition is the filtering criteria that determines if a corresponding call handling action is performed. When a condition statement consists of multiple criteria, each criterion must be satisfied or the action is not performed.

  Call Handling Rules defines the following six types of criteria

  — **Phone number match:** The phone number match is satisfied when the caller ID of the inbound call is a subset of the specified match type. Users can specify a maximum of ten ***phone number match*** entries.

  Users select from the following match types:

  Specific number – user specifies the number that must match the caller ID; numbers can be internal extension or phone number external to the system

  Every internal number – matches all calls originating from a device within the ShoreTel network.

  Any internal extension starting with – user specifies the digits that must match the initial digits of numbers originating from internal callers

  Every external number – matches all calls originating from a device not located within the ShoreTel network

  Any external extension starting with – user specifies the digits that must match the initial digits of numbers originating from phone numbers external to the system

  Off system extension – user specifies the off system extension that must match the caller ID

  Private – matches all calls that are identified by caller ID as *private*

  Out of area / unknown – matches all calls that caller ID identifies as *out of area* or *unknown*

  — **I am on the phone:** This criterion is satisfied when the user's phone is ***busy***.

  — **Call Handling Mode:** This criterion is satisfied when the user's active Call Handling Mode matches the specified mode.

  — **Time of day:** This criterion is satisfied when the call is received during the specified time ranges. *Time of day* entries are based on the timezone setting of the site to which the user is assigned.

  — **Day of week:** This criterion is satisfied when the call is received on one of the specified days. *Day of week* entries are based on the timezone setting of the site to which the user is assigned.

  — **DNIS Match:** This criterion is satisfied when the DNIS of the inbound call matches the specified string.

  Workgroup and Hunt Group DNIS numbers are not propagated to members that answer group calls. This prevents the filtering calls on the basis of DNIS numbers not directly associated to the entity ultimately receiving the call.

- **Action:** The action specifies the resolution for calls that match the specified condition. Call Handling Rules define the following five action types:

  — **Forward Call to Specific Number:** This action routes the call to the specified number. Users can select one of the following number types:

  Specific Number
  Off System Extension

  — **Forward Call to Voice Mail:** This action routes the call to the recipient's voice mail.

— **Forward Call to Auto Find Me:** This action routes the call to voicemail, which then forwards the call to the recipient's Find Me number.

— **Forward Call to Announced Find Me:** This action routes the call to voicemail, which then forwards the call to the recipient's Find Me number where the caller's name is announced to the recipient, as described in Section 4.5.6.

— **Play Ringtone:** This action programs the phone to play the specified ShorePhone ringtone. This action is available only when receiving calls on a ShorePhone that support multiple ringtones.

Call Routing Plan

The Call Routing Plan is the Personalized Call Handling component that determines the routing method of a user's inbound calls. The following sections describe the composition and operation of a call routing plan.

A call routing plan consists of a maximum of ten call handling rules. The plan specifies the rules that are active and lists the rules in the order that by which they are used to evaluate characteristics of the inbound call.

When a user receives an inbound call, the system evaluates the characteristics against the highest priority call handling rule that is enabled. If all of the criteria comprising the condition of that rule matches the call characteristics, the call is routed as specified by the rule's action and the plan execution is complete. If any of the criteria do not match the call characteristics, the system continues the plan execution by evaluating the call against the enable rule with the next highest priority.

This process is repeated for all enabled call handling rules. If the call characteristics do not match the conditions of any enabled call handling rule, the call is routed as specified by the active Call Handling Mode.

4.5.5.3 Implementing Personalized Call Handling

The following steps are required to implement Personalized Call Handling for a system user:

- Receive Administrator Access to Personalized Call Permission
- Create and Edit Call Handling Rules
- Manage the Call Routing Plan
- Administrative Oversight of defined plans

The following sections describes the required steps.

Administrative Permission

All users that have access to Professional, Workgroup Agent, Workgroup Supervisor, or Operator Call Manager are authorized to use Personalized Call Handling.

Your system administrator can provide authorization for a Call Manager version that supports Personalized Call Handling.

Creating and Editing Call Handling Rules

Personalized Call Handling Rules are created or edited from the **Options and Preferences: Personalized Call Handling panel**, as shown in Figure 4-8. Refer to Section A.2.12 on page 165 for a complete description of the Personalized Call Handling panel.

To create a Call Handling Rule:

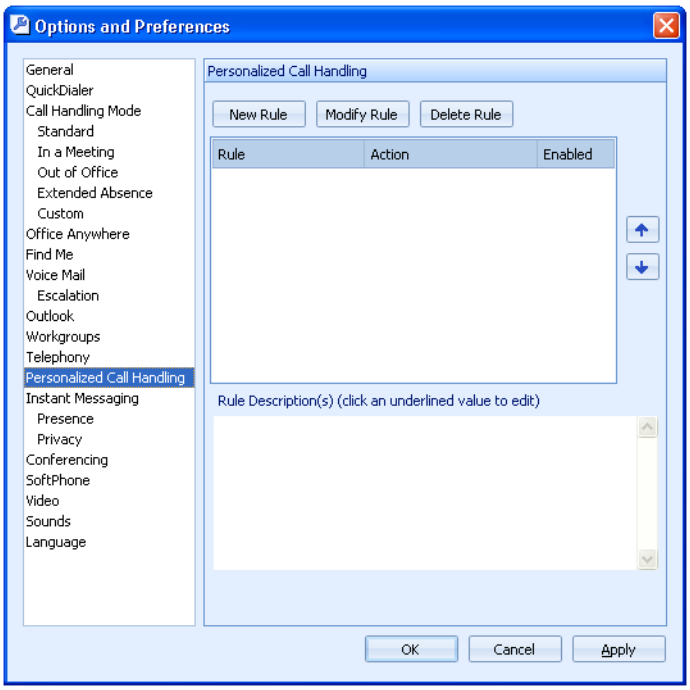


Figure 4-8 Personalized Call Handling panel

Step 1 Press the New Rule button, located at the top of the panel.

Call Manager displays the Personalized Call Handling Setup panel, as shown in Figure 4-9.

Step 2 Select all conditions in the ***Choose Condition to handle inbound calls*** section located in the top half of the panel.

The ***Condition Description*** section, located in the bottom half of the panel, displays the set of conditions that an inbound call must meet to be filtered by the rule. The blue hypertext regions link to dialog boxes that defined specific criteria for filtering calls.

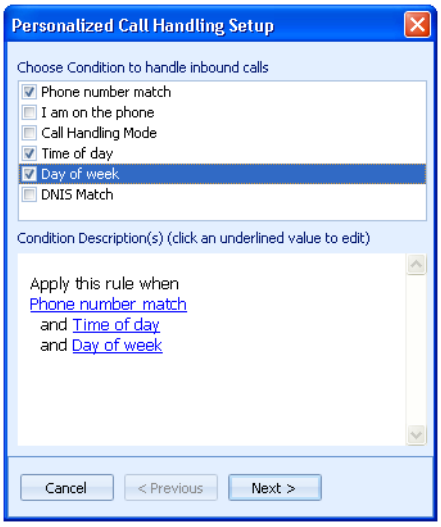


Figure 4-9 Personalized Call Handling Setup panel – choosing condition

Step 3 Click each hypertext region, enter specific filtering criteria in the dialog boxes.

Figure 4-10 displays the Phone Number match dialog box that Call Manager displays when the Phone Number Match hypertext is clicked. Pressing the OK button closes the dialog boxes and displays the selected parameters on the Condition Selection section.

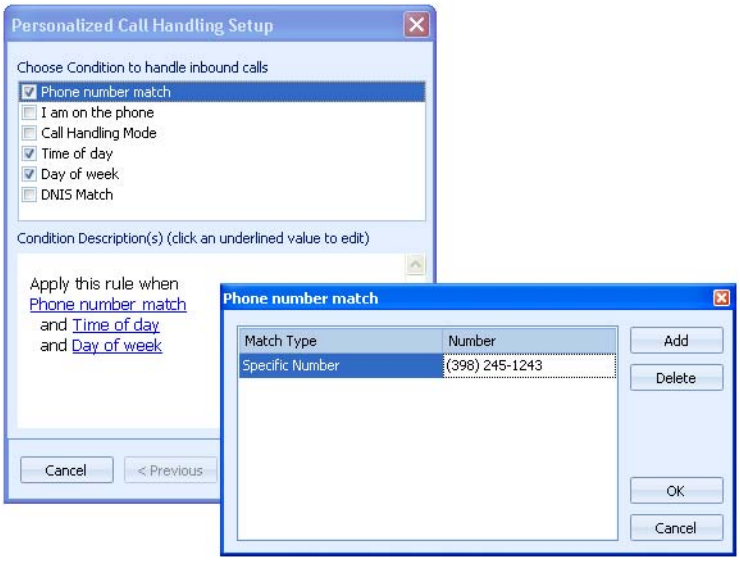


Figure 4-10 Phone Number Match dialog box

Step 4 Press the **Next** button located in the bottom right corner of the Personalized Call Handling Setup panel.

The top section displays ***Choose Action for rule*** options; and bottom section displays Action Description, as shown in Figure 4-11.

Step 5 Select the desired call handling action for calls from the ***Choose Action for rule*** list.

The **Action Description** section, located in the bottom half of the panel, displays the selected action.

Step 6 If the selected action in the Action Description section includes hypertext, click the link to display an action dialog box. Selected the desired option in the dialog box and press the OK button.

Step 7 Press the Next button located in the bottom right corner of the Personalized Call Handling Setup panel.

Step 8 Enter a name for the new rule in the ***Enter Rule Name*** data entry field.

Step 9 Press the Finish button located in the bottom right corner of the Personalized Call Handling Setup panel.

The new rule appears in the Rule list of the Options and Preferences: Personalized Call Handling panel, as shown in Figure 4-12.

To edit an existing Personalized Call Handling Rule:

Step 1 Highlight the desired rule in the rule list in the top half of the Personalized Call Handling panel.

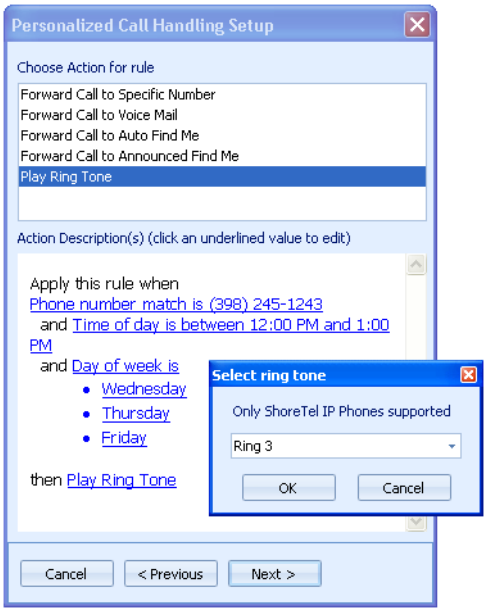

Personalized Call Handling Setup
Choose Action for rule
Forward Call to Specific Number
Forward Call to Voice Mail
Forward Call to Auto Find Me
Forward Call to Announced Find Me
Play Ring Tone
Action Description(s) (click an underlined value to edit)
Apply this rule when
Phone number match is (398) 245-1243
and Time of day is between 12:00 PM and 1:00 PM
and Day of week is
Wednesday
Thursday
Friday
then Play Ring Tone
Select ring tone
Only ShoreTel IP Phones supported
Ring 3
OK
Cancel
Cancel
< Previous
Next >

Figure 4-11 Personalized Call Handling Setup panel – choosing action

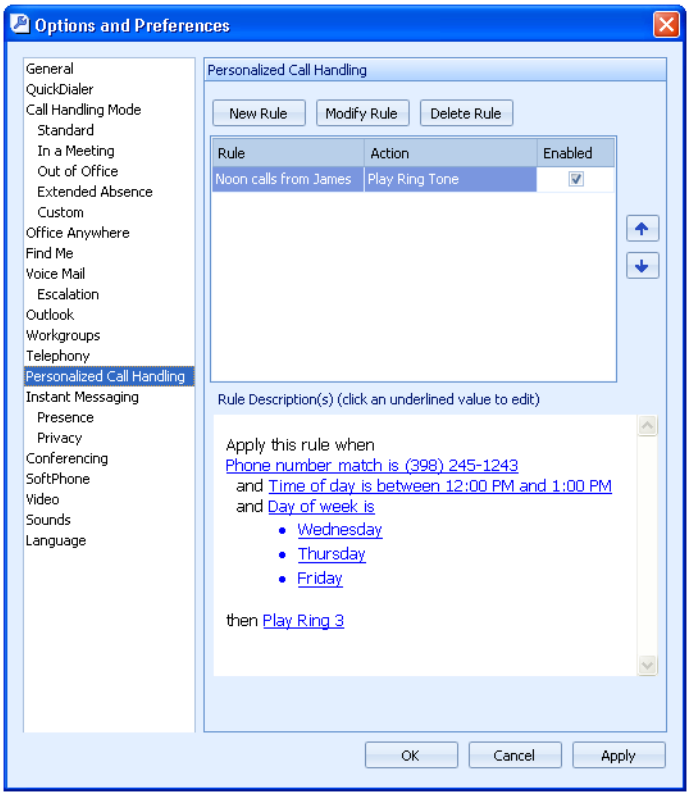


Figure 4-12 Personalized Call Handling Rule

Step 2 Press the Modify Rule button at the top of the panel.

Step 3 Modify rule parameters, using the same steps that create a Call Handling Rule.

Managing the Call Routing Plan

The Call Routing Plan determines the rules that are actively filtering calls and specifies the order that the rules are applied to calls. If the filtering criteria of more than one rule matches a call's characteristic, the first rule in the list that filters a call determines the handling action for that call.

To enable a Call Handling Rule, select the Enabled box located in the right column of the rule. In Figure 4-13, all of the call handling rules are selected.

To change the filtering order of a call handling rule, highlight the rule and press the Up or Down arrows located to the right of the call handling rule list.

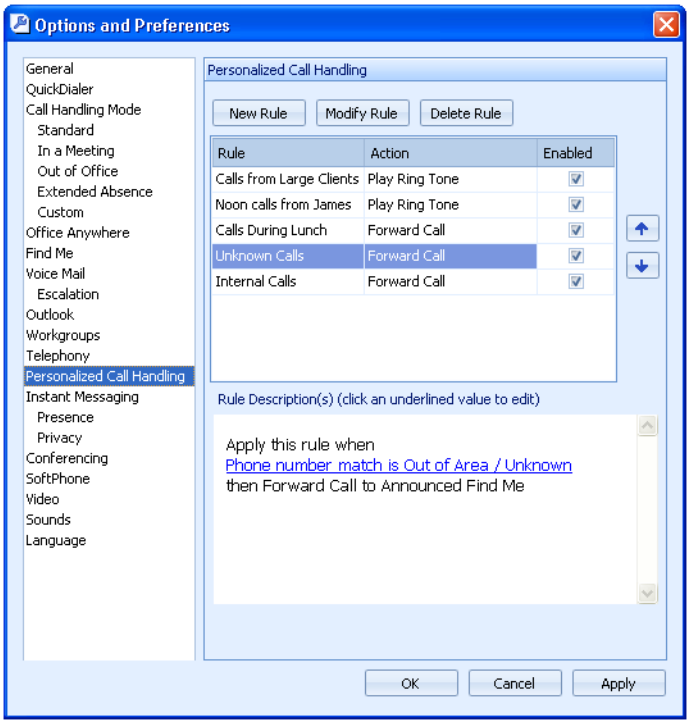


Figure 4-13 Call Handling Plan with multiple rules

Administrative Oversight

System administrators can view each user's call handling plan and enable or disable individual rules. Contact your system administrator for more information.

4.5.6 Find Me

Find Me call handling allows callers who are routed to your voice mailbox to contact you at alternate devices by pressing "1" while listening to your voice mail greeting. You can specify two numbers for rerouting callers through Find Me. The standard voice mail greeting does not prompt the caller on the availability of Find Me call handling.

Find Me call handling is enabled through call handling mode settings. Find Me destinations are independent of the call handling modes that activate Find Me.

After the caller presses 1, call manager plays an audio prompt advising the caller that Find Me destinations are being called. If the call is not answered at either Find Me destination, the caller is sent to your voice mail.

When a call is forwarded to a Find Me destination, the phone at the Find Me destination displays your voice mail's caller ID. When you answer the call, you hear a prompt announcing the intended call recipient and the caller's ID information.

Announced Find Me provides for the recording of the caller's name for calls routed to Find Me destinations. Announced Find Me enhances the base Find Me feature such that:

- The caller's name is announced to the recipient of a Find Me call.
- Callers from external numbers or from internal extensions without a recorded name are prompted to record their name before the call is routed to the recipient.

  Announced Find Me can be configured to require all users to record their names at the time of the call, except for those from internal extensions with a recorded name.

4.5.6.1 Activating Find Me

Find Me call handling is enabled during active Call Handling Mode periods that specify Find Me. Refer to Section 4.5.4 on page 41 for information on active call handling modes and configuring call handling mode parameters.

4.5.6.2 Configuring Find Me

The **Options and Preferences: Find Me** panel specifies the Find Me destinations and specify the number of times Call Manager rings each Find Me device. You can also program Call Manager to send inbound callers to your Find Me destinations without requiring the caller to press 1.

Section A.2.5 on page 156 describes the **Options and Preferences: Find Me** panel.

4.5.6.3 Configuring Announced Find Me

Announced Find Me is available for users assigned to a class of service for which Find Me is authorized. ShoreWare provides three methods of enabling Announced Find Me for a user: from Director, from Call Manager, and from Web Access.

Refer to Section A.2.6 on page 157 for information on configuring Announced Find Me from the **Options and Preferences: Find Me** panel.

4.6 During an Active Call

Call Manager represents each voice call connection as a call cell in the Active Call Area. Section 3.1.2.6 on page 23 describes the Active Call Area and call cells.

The following sections describe call management tasks that you can perform through Call Manager.

4.6.1 Adjusting the Volume

The audio volume is adjusted on the device that is assigned to your extension. Calls are also muted and unmuted from the assigned device.

4.6.2 Handling Multiple Calls

The number of voice calls that your extension can simultaneously handle is configured by your administrator. The number of calls that Call Manager can display in the Active Call Area is configured in the **Options and Preferences: Telephony panel**, as described in Section A.2.11 on page 164.

Voice call management task for a call are performed by pressing the buttons on the right side of the call cell. The set of available buttons depend on the state of the call. Call operations listed through the Main window, Application Button, System Tray icon, and context menus are available for the call referenced by the highlighted call cell.

To change the highlighted call cell, click the cursor in the desired call cell.

To answer an inbound call while talking on another call, perform one of the call answering tasks described in Section 4.5.2.1 on page 39. Call Manager places the current call on hold when you answer an inbound call.

To switch the active voice path to a different active call, click the call cell representing the second call. Call Manager places the first call on hold when you switch the active voice path to the second call.

4.6.3 Call Transfer

Call transfers send your call to a selected user or device. Most calls are transferred through a transfer panel. You can also configure Call Manager to perform guided transfers of incoming calls.

4.6.3.1 Types of Call Transfers

The following are the types of call transfers supported by Call Manager:

- **Transfer:** A transfer immediately sends your call to the recipient. Section 4.6.3.2 and Section 4.6.3.3 describes call transfer methods.
- **Consultative Transfer:** A consultative transfers connects you to the recipient of the transfer, then sends the call upon your signal. This allows you to introduce the call to the recipient before the transfer. Section 4.6.3.2 and Section 4.6.3.3 describes consultative call transfer methods.
- **Intercom Transfer:** An intercom transfer connects the transferred party to the system intercom. Section 4.7.4 on page 65 describes intercom calls.
- **Mailbox Transfer:** A mailbox transfer sends the transferred party to the recipient's voice mailbox. Section 4.6.3.2 describes call transfer methods.
- **Voice Mail Transfer:** A transfer to voice mail sends the transferred party to your voice mailbox. Section 4.6.3.4 describes voice mail transfer methods.
- **Auto Attendant Transfer:** A transfer to the auto attendant sends the transferred party to the active auto attendant. Section 4.6.3.5 describes auto attendant transfer methods.

4.6.3.2 Using the Transfer Panel

The transfer panel, as shown in Figure 4-14, supports transfers, consultative transfers, intercom transfers, mailbox transfers, and whisper pages. Section 4.8.3 on page 67 describes whisper pages.

To perform a transfer through the Transfer Panel:

Step 1 Select the call to be transferred by clicking its call cell.

Step 2 Open the Transfer panel by performing one of the following:

- Click the Transfer button on the call cell.
- Right click the call cell and select ***Transfer***
- Select ***Call -> Transfer*** from the main menu.

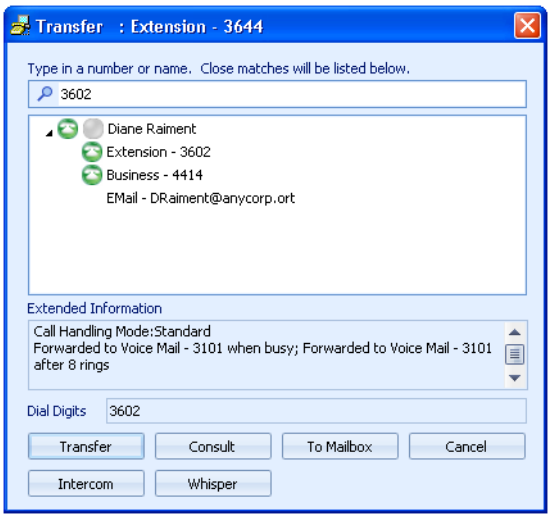


Figure 4-14 Transfer panel

- Click the Application Button and select *Call -> Transfer.*
- Right click the ShoreTel Tray icon and select *Call -> Transfer.*
- Press Ctrl+T
- Press F10

Step 3 Begin entering the call recipient's name or number in the data entry field at the top of the panel.

The table displays a list of directory entries filtered by data entry field contents.

Step 4 Select the desired recipient in the table.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the number to be dialed when you have selected a valid contact.

Step 5 Press the button at the bottom of the panel that corresponds to your desired transfer type.

- Press the ***Transfer*** button to immediately transfer the call to the recipient.
- Press the ***Consult*** button to talk with the recipient before transferring the call.
- Press the ***Intercom*** button to transfer the call to the intercom system.
- Press the ***To Mailbox*** button to transfer the call to the recipient's voice mailbox.
- Press ***Whisper Page*** to send a whisper page to the recipient.

4.6.3.3 Guided Transfer

Call Manager provides **Guided Transfer** when initiating one call while another call is connected. When you initiate a new call while another call is in progress, the call in progress is placed on hold and becomes the ***guided call***.

When the second call reaches the Proceeding or Connected state, the cell for the first call displays Guided Transfer Conference buttons labeled **Transfer**, **Conference**, and **No Thanks**, as shown in Figure 4-15. The ***Transfer*** and ***No Thanks*** buttons are always active; the ***Conference*** button is inactive while the second call is in Proceeding state and becomes active when the second call reaches Connected state.

- **When you press the *Transfer* button before the call reaches the Connected button**, the call is immediately transferred.

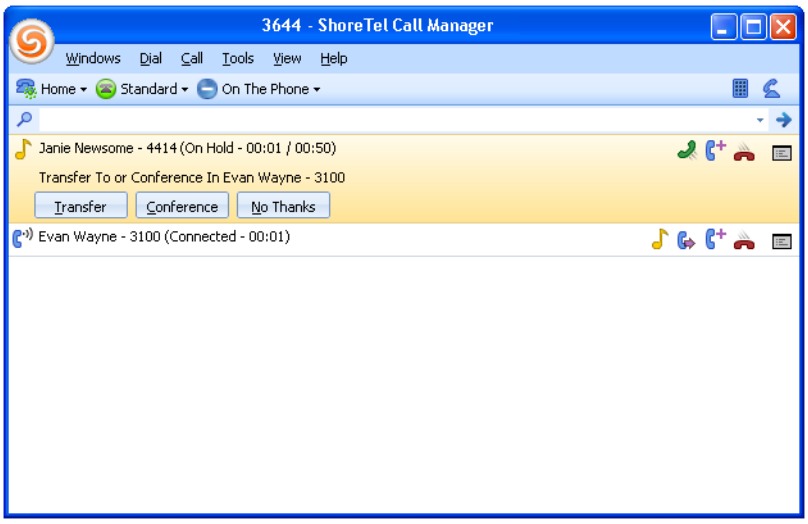

3644 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Home Standard On The Phone
Janie Newsome - 4414 (On Hold - 00:01 / 00:50)
Transfer To or Conference In Evan Wayne - 3100
Transfer
Conference
No Thanks
Evan Wayne - 3100 (Connected - 00:01)

Figure 4-15 Guided Transfer panel

- **When you press the *Transfer* button after the second call reaches the Connected state**, ShoreWare performs a consultative transfer where the first call is the transferred call and the second call is to the transfer recipient.
- **When you press the *Conference* button**, Call Manager either initiates or continues a conference by adding the new call to the conference. Call Manager disables the *Transfer* button when a Conference call is active.

4.6.3.4 Transfer to Voice Mail

The Main window provides several options for transferring callers to your voice mailbox.

To send a caller to your voice mailbox from Call Manager, perform one of the following:

- Right click the call cell and select *To Voice Mail*
- Select *Call -> To Voice Mail* from the main menu.
- Click the Application Button and select *Call -> To Voice Mail.*
- Right click the ShoreTel Tray icon and select *Call -> To Voice Mail*.
- Press Ctrl+Y

4.6.3.5 Transfer to Auto Attendant

The Main window provides several options for transferring callers to the auto attendant.

To send a caller to the auto attendant from Call Manager, perform one of the following:

- Right click the call cell and select *To Auto Attendant*
- Select *Call -> To Auto Attendant* from the main menu.
- Click the Application Button and select *Call -> To Auto Attendant.*
- Right click the ShoreTel Tray icon and select *Call -> Auto Attendant*.

4.6.4 Call Interruptions

4.6.4.1 Hold

The Hold function maintains the state of a call while suspending the conversation. Calls that you place on hold remain associated with your extension; you can only resume your held calls from your extension.

When you place a caller on hold and hang up, the telephone rings once after 10 seconds notifying you that a call is on hold. If the first reminder is ignored, the phone rings on a 60-second interval until the call is connected or disconnected.

Call cells for calls that you place on hold remain on the Active Call Area of the main window. The call state indicates that the call is on hold and lists the hold period. Figure 4-16 displays a call cell of a call on hold.

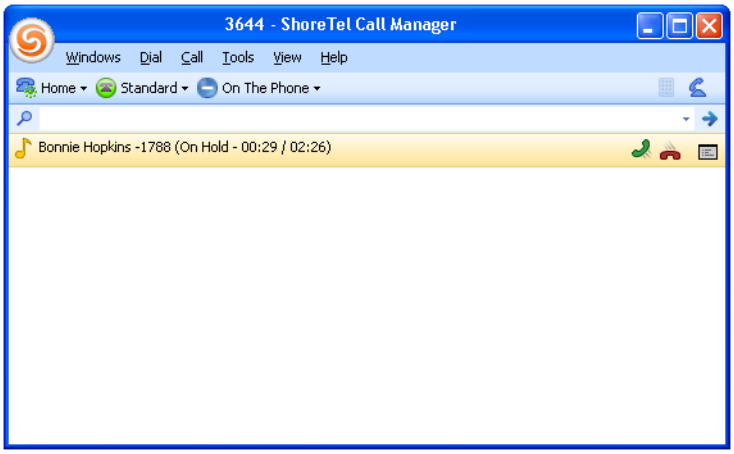

3644 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Home Standard On The Phone
Bonnie Hopkins -1788 (On Hold - 00:29 / 02:26)

Figure 4-16 Call on Hold call cell

To place the a call on hold, perform one of the following on the call's cell:

- Click the **Hold** button on the call cell.
- Right click the call cell and select ***Hold***
- Select ***Call -> Hold*** from the main menu.
- Click the Application Button and select ***Call -> Hold.***
- Press Ctrl+H

  Call Manager indicates the call is on hold in the cell that represents the call.

To pick up a call that is on hold, perform one of the following on the call's cell:

- Click the **Answer** button on the call cell.
- Right click the call cell and select ***Hold*** or ***Answer.***
- Select ***Call -> Hold*** or ***Answer*** from the main menu.
- Click the Application Button and select ***Call -> Hold*** or ***Answer.***
- Press Ctrl+H or Ctrl+A

  Call Manager indicates the call is active in the cell that represents the call.

4.6.4.2 Park and Unpark

Parking a call places a call on hold on another extension. This allows you to park a call on one extension and pick it up from a different extension. Unparking a call is retrieving a call that you previously parked on another extension. Calls can be unparked only by the person that parked it.

Pressing the Extension Monitoring programmable button, when it is appropriately configured by the system administrator, parks the active call on the stack of the monitored extension.

Bounced calls are unanswered parked calls that are returned to the extension from where they were parked after a period specified by the system administrator. Figure 4-17 displays a call cell of a bounced call.

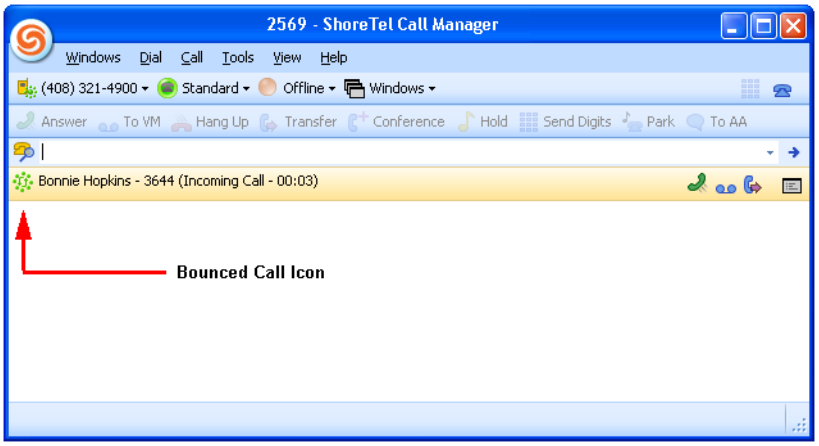

2569 - ShoreTel Call Manager
Windows Dial Call Tools View Help
(408) 321-4900 Standard Offline Windows
Answer To VM Hang Up Transfer Conference Hold Send Digits Park To AA
Bonnie Hopkins - 3644 (Incoming Call - 00:03)
Bounced Call Icon

Figure 4-17 Call Manager – Bounced Call icon

To park a call, perform one of the following on the call's cell:

Step 1 Perform one of the following:

- Right click the call cell and select ***Park***
- Select ***Call -> Park*** from the main menu.
- Click the Application Button and select ***Call -> Park.***
- Press Ctrl+K

Step 2 Begin entering the contact name or number in the data entry field of the Park panel, as shown in Figure 4-18.

The table lists your directory entries filtered by the data entry field contents.

Step 3 Select the desired user in the table.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the recipient's number after you select a table entry.

Step 4 Press one of the **Park** buttons at the bottom of the panel:

- Press the ***Park*** button to perform no additional action after parking the call.
- Press the ***Park/Intercom*** button to park the call and then initiate a new intercom call – typically to contact the recipient of the parked call.
- Press the ***Park/Page*** button to park the call and then initiate a new page call – typically to contact the recipient of the parked call.

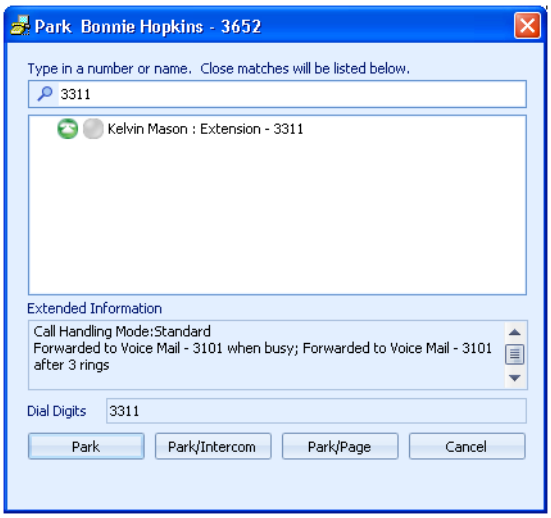

Park Bonnie Hopkins - 3652
Type in a number or name. Close matches will be listed below.
3311
Kelvin Mason : Extension - 3311
Extended Information
Call Handling Mode:Standard
Forwarded to Voice Mail - 3101 when busy; Forwarded to Voice Mail - 3101 after 3 rings
Dial Digits
3311
Park
Park/Intercom
Park/Page
Cancel

Figure 4-18 Park panel

The call cell that represents the parked call is removed from your Active Call Area. If the recipient's call manager is active, the parked call appears on that user's Active Call Area as a call on hold.

To unpark a call from Call Manager:

Step 1 Perform one of the following:

- Select ***Dial -> Pickup/Unpark*** from the Main Menu.
- Click the Application Button and select ***Dial -> Pickup/Unpark***.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Pickup/Unpark***
- Press Ctrl+Alt+P

Step 2 Begin entering the contact name or number in the data entry field of the Pickup panel. Figure 4-3 displays the Pickup panel.

The table lists your directory entries filtered by the data entry field contents.

Step 3 Either select a contact in the table or complete the number in the data entry field.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the extension where the call was parked after you select a table entry.

Step 4 Press the **Unpark** button at the bottom of the panel.

4.6.5 Call Recording

Call Manager supports the recording of 2- or 3-way trunk calls. Converged conference calls cannot be recorded. Recording stops when a call is parked, unparked, or transferred. You can record your calls or those of other system users.

4.6.5.1 Recording your calls

You can record conversations through Call Manager if authorized by the system administrator. Call recording is performed on a call by call basis and must be initiated for each call that you want to record. A tone that informs external callers that there call is

being recorded is a system option that is configured by the system administrator. ShoreWare places the recording file in your voice mail box when you end the recording or terminate the call.

To initiate a Call Recording of an active call, perform one of the following:

- Right click the call cell and select ***Record***
- Select ***Call -> Record*** from the main menu.
- Click the Application Button and select ***Call -> Record.***
- Press Ctrl+E.

  You can also initiate a call recording by pressing the **Record Call** button in the Call Manager toolbar. This button must be configured by the system administrator. Calls recorded by pressing the **Record Call** button are placed in the voice mail box designated by the system administrator.

To terminate a Call Recording from Call Manager, perform one of the following:

- End the call, as described in Section 4.6.7.
- Right click the call cell and select ***Stop Recording***
- Select ***Call -> Stop Recording*** from the main menu.
- Click the Application Button and select ***Call -> Stop Recording.***
- Press Ctrl+E

4.6.5.2 Recording the Calls of Other Users

ShoreWare permits the recording of third party calls involving a system user over a trunk. The system administrator authorizes users to record other users conversation and can designate which users' conversations can be recorded.

To initiate the recording of another user's call:

- Right click the desired user in the Contact List and select ***Record***.
- Right click the desired user in the Agent Monitor and select ***Record***.

  You can also initiate a call recording of another user by pressing the **Record Extension** button in the Call Manager toolbar. This button, configured by the system administrator, initiates the recording of a designated user specified by the administrator; the ability to record calls of two different users requires two distinct **Record Extension** buttons on your toolbars. Calls recorded by pressing the **Record Extension** button are placed in the voice mail box designated by the system administrator.

4.6.6 Sending Tones

The Call Manager keypad has twelve keys, labeled 0 to 9, *, and #. Pressing a key sends a DTMF tone to the other party of the voice call. You cannot initiate a voice call with the keypad.

To access the keypad, press the keypad button located on the right side of the assignment bar. Figure 4-19 displays the keypad and the Call Manager button that accesses the keypad.

4.6.7 Ending a Call

How you hang up a call depends on the mode in which you answer the call.

To disconnect a call from Call Manager, perform one of the following:

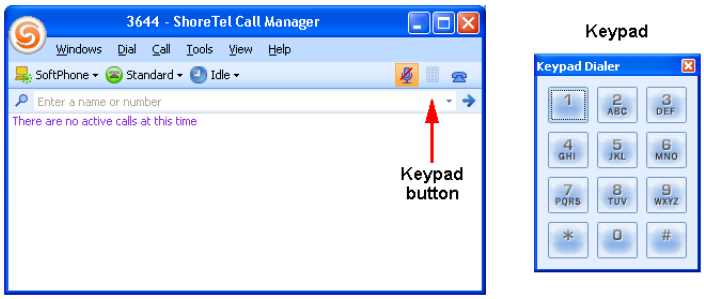


Figure 4-19 Keypad button and the Keypad

- Press the *HangUp* button on the call cell.
- Right click the call cell and select ***Hang Up***
- Select ***Call -> Hang Up*** from the main menu.
- Click the Application Button and select ***Call -> Hang Up***.
- Right click the ShoreTel Tray icon and select ***Call -> Hang Up***.
- Press Ctrl+U

After disconnecting the call, place the device assigned to your extension on hook.

4.7 Specialty Calls

4.7.1 Conference Calls

Conference calls are voice calls that involve more than two parties. Call Manager supports conference calls with a maximum of six participants. The maximum conference call size is specified by your system administrator. Conference participants may be ShoreWare users or external parties.

The Active Call Area in Figure 4-20 contains a conference call cell. The top line in the cell denotes the Conference Call type. The lines directly below the Conference Call indicator and status list the participants of the conference call.

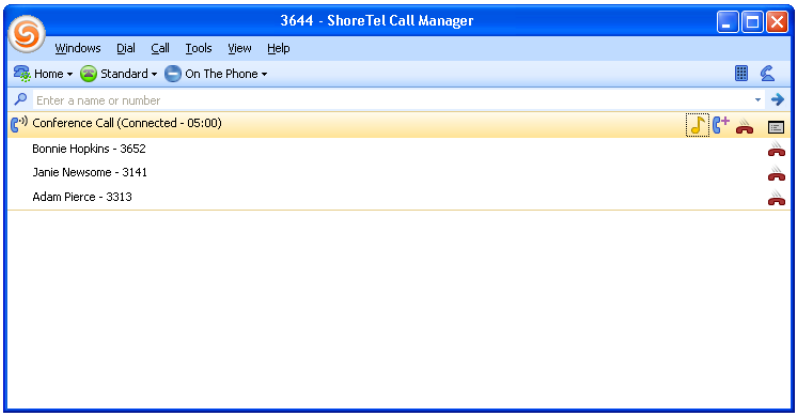

3644 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Home Standard On The Phone
Enter a name or number
Conference Call (Connected - 05:00)
Bonnie Hopkins - 3652
Janie Newsome - 3141
Adam Pierce - 3313

Figure 4-20 Conference call cell

- **To initiate a conference call**, join two or more calls together, as described in Section 4.7.1.1.

- **To terminate a conference call**, either hang up the entire conference or individually terminate call connections with conference participants, as described in Section 4.7.1.2.

4.7.1.1 Adding Calls to a Conference

Three Call Manager operations adds participants into a conference call: specifying new participants, joining two calls, and a guided addition of a new call.

Specifying New Participants

Your specifying new participant through a Conference panel, shown in Figure 4-21.

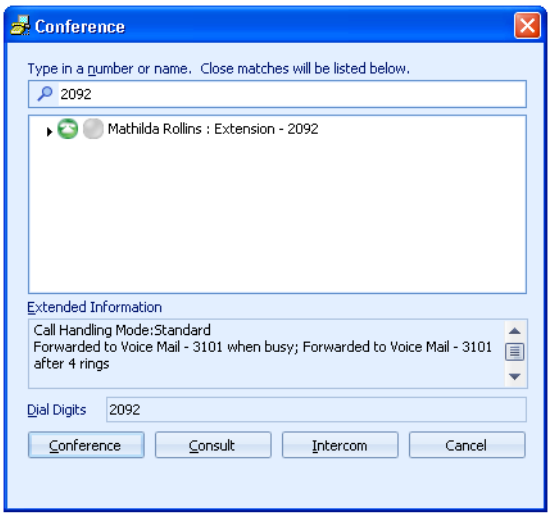


Figure 4-21 Conference panel

To specify a new participant through the Conference panel:

Step 1 Verify the selected voice call is in the ***connected*** state.

Step 2 Open the Conference panel by performing one of the following:

- Click the Conference button on the call cell.
- Right click the call cell and select ***Conference***
- Select ***Call -> Conference*** from the main menu.
- Click the Application Button and select ***Call -> Conference.***
- Press Ctrl+J

Step 3 Begin entering the contact name or number in the data entry field of the Conference panel.

The table displays a list of directory entries filtered by data entry field contents.

Step 4 Either select a contact in the table or complete the number in the data entry field.

The **Dial Digits** field, located above the buttons at the bottom of the panel, lists the contact's number after you select a table entry

Step 5 Press the button at the bottom of the panel that corresponds to your desired Conference consultation type.

Joining two calls

Joining two calls merges them into a single conference call. You join the call in the connected state with the selected call. The selected call must be on hold.

To join the connected call with the call on hold into a single call:

Step 1 Verify that the Active Call Area contains one call in the ***connected*** state and that the selected voice call is in the ***on hold*** state.

Step 2 Perform one of the following actions:

- Click the Conference button on the call cell.
- Right click the call cell and select ***Conference***
- Select ***Call -> Conference*** from the main menu.
- Click the Application Button and select ***Call -> Conference.***
- Press Ctrl+J

The calls are joined into a single conference call.

Guided Addition of a New Call

When you have enabled Guided Transfers and Conferences, the call cell of a new call provides an option to transfer a call or join it with another call if you have another active call when receiving the call. Refer to Section 4.6.3.3 on page 54 for information about Guided Transfers and Conferences.

4.7.1.2 Removing Calls from a Conference

You can remove individual call from a conference or terminate the entire conference with a single command.

To terminate the entire conference, perform one of the following:

- Press the HangUp button on the call cell.
- Right click the call cell and select ***Hang Up***
- Select ***Call -> Hang Up*** from the main menu.
- Click the Application Button and select ***Call -> Hang Up.***
- Press Ctrl+U

After disconnecting the call, place the device assigned to your extension on hook.

To terminate one call of the conference, perform one of the following:

- Press the HangUp button on the call cell that corresponds to the party to be dropped.
- Right click the call cell and select the ***Drop*** option that corresponds to the party to be dropped.
- Open the ***Call*** option from the main menu and select the ***Drop*** option that corresponds to the party to be dropped.
- Click the Application Button, open the Call Menu and select the ***Drop*** option that corresponds to the party to be dropped.

After disconnecting the call, place the device assigned to your extension on hook.

4.7.2 Converged Conferencing

Converged Conferencing is a ShoreWare feature that supports calls with a maximum of 30 participants. The precise capacity depends on the topology of the network and the system configuration. Individual users must be authorized to perform converged conference calls. Consult your system administrator for capacity and authorization information.

You perform a Converged Conference call by accessing the Conference Bridge on your system. You must have an account on the Conference Bridge to initiate a converged conference call through that bridge. Refer to Converged Conference documentation for instructions on conducting a converged conference call.

Call Manager supports the initiation of a Converged Conference call through a specified Conference bridge account. All other aspects of the call are managed through the Conference bridge user interface.

To specify the Conference Bridge account for making Converged Conference Calls:

Step 1 Open the Options and Preferences window by performing one of the following:

- Select ***Tools -> Options*** from the Main Menu.
- Click the Application Button and select **Options**.
- Right click the Call Manager icon in the System Tray and select **Options.**
- Press Ctrl+O.

Step 2 Select ***Conferencing*** in the menu on the left side of the window.

Step 3 Enter your Conference Bridge user name and password in the data entry fields.

Consult your system administrator for Conference Bridge logon information. Section A.2.14 on page 170 describes the Options and Preferences: Conferencing panel

To initiate a voice call through the Make New Call panel, perform one of the following:

- Select ***Windows -> Conference Manager*** from the Main Menu.
- Click the Application Button and select ***Windows -> Conference Manager***.
- Right click the ShoreTel icon in the System Tray and select ***Windows -> Conference Manager***.
- Press Ctrl+Alt+K

Call Manager displays the Conference Bridge dialog box, as shown in Figure 4-22.

4.7.3 Video Calls

4.7.3.1 Description

ShoreWare supports video calls between two Call Manager users that are communicating directly. Call Manager users communicating through a ShoreWare server cannot use video. ShoreWare does not support server-based, star-configurations or interoperability with other video solutions. ShoreWare performs video calls through an SVC codec.

ShoreWare does not support video-only calls. Video is added to a voice call as requested by a user. Video can either be added to an active voice call or established as a part of a new voice call.

Figure 4-22 Conference Bridge Login panel

4.7.3.2 Supported Video Devices

Many video devices provide options to compensate for poor light conditions. Enabling these options my impact the frame rate of the camera. Using optimal light conditions is essential to ensure a good image quality and a proper frame rate when making video calls.

For a list of Video Cameras currently supported by Call Manager, refer to "Video Camera Requirements for ShoreWare Call Manager, Feature AN-10062". These application notes are posted on the support site and searchable through the Knowledge base.

4.7.3.3 Adding Video to Existing Voice Calls

Users request a video call through the following Call Manager components:

- Active call cell

  The video request button is active if both voice call participants are able to perform video calls.

- Call Manager Toolbar
- Make New Call menu or toolbar item

Video session request recipients are notified when a Call Manager user requests a video session. The notification panel display buttons for accepting or rejecting the request.

4.7.3.4 Video Window

Video is shown in an independent window that is not dockable with the Call Manager window. The video window displays two ports to show both call participants. The resident Call Manager user is displayed in the smaller window.

The video window provides the following components:

- **Video Status and Message Bar:** This component displays the video session status.
- **Answer Button:** This button resumes a call that is on hold. The video window displays this button when the user places the call on hold.
- **Hang-Up Button:** This button terminates the call.

- **Transfer Button:** This button transfers the call, including the video session, to another user.

Terminating a voice call also ends the video session. Ending a video session does not terminate a voice call.

4.7.3.5 Configuring Video Call Settings

Call Manager users configure their Video Call settings from the Options and Preferences: Video panel.

Section A.2.16 on page 172 describes the **Options and Preferences: Video** panel.

4.7.4 Intercom

Intercom calls establish a voice path from the caller to the recipient immediately after the number is dialed. Call progress tones are not played for the recipient and the call is automatically connected without any recipient action. Intercom calls cannot be forwarded.

Intercom calls are automatically answered when the recipient's phone is:

- an IP phone with no active calls
- an analog phone that is off-hook with no active calls
- a SoftPhone that is off-hook with no active calls

Intercom calls are handled as normal calls when the recipient's phone is:

- the recipient's phone is on-hook
- the recipient's phone is in an active call
- the recipient does not have permission to receive Intercom calls

Intercom calls always override an extension's active call handling mode. For example, an intercom call to an extension that forwards all calls to voice mail will ring the extension.

The system administrator authorizes users to make or receive intercom calls.

To make an Intercom call from Call Manager, perform one of the following:

- Click the Application Button and select ***Dial -> Intercom.***
- Select ***Dial -> Intercom*** from the main menu.
- Right click the ShoreTel Tray icon and select ***Dial -> Intercom.***
- Press Ctrl+Alt+N

To transfer an existing call to the intercom, execute a transfer from the Transfer panel as described in Section 4.6.3.2 on page 53.

4.7.5 Overhead Page

A paging extension accesses a site's overhead paging system. Calls to the paging extension are broadcast through the overhead paging system. ShoreWare defines one paging extension for each site. You can only call the paging extension at your site.

The system administrator authorizes users to make paging calls.

To call the paging extension, perform one of the following:

- Click the Application Button and select ***Dial -> Overhead Page.***
- Select ***Dial -> Overhead Page*** from the main menu.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Overhead Page.***

- Press Ctrl+Alt+G

The Overhead Page option on Call Manager menus is disabled if a paging extension is not configured for your site or if you do not have authorization to call the paging extension.

4.8 Call Intervention

Call interventions are actions that Call Manager users perform on calls in which they are not a primary participant. Barge In, Silent Monitor, and Whisper Page options are available through normal Call Manager menus and Programmable Toolbars.

4.8.1 Barge In

The Barge In function allows a user to join into another user's active call. The Barge In initiator can listen and speak to all other call participants. The right to initiate a Barge In operation is set by the system administrator. The system administrator also designates users whose calls can be interrupted by a Barge In.

To Barge In another user's call:

Step 1 Perform one of the following

- Click the Application Button, then select ***Dial -> Barge In.***
- Select ***Dial -> Barge In*** from the main menu.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Barge In.***
- Right click the call cell and select ***Call -> Barge In.***

Call Manager displays the **Barge In** dialog box.

Step 2 Enter an extension or select from the drop-down list.

Step 3 Click the **Barge In** button.

4.8.2 Silent Monitor

Silent Monitor allows a user to listen to another user's call without being heard by any of the call participants. When a call is being monitored, external participants may hear a monitor tone; system users are not signaled when their calls are monitored.

The right to initiate a Silent Monitor operation is set by the system administrator. The system administrator also designates users whose calls can be silently monitored.

To perform a Silent Monitor:

Step 1 Perform one of the following

- Click the Application Button, then select ***Dial -> Silent Monitor.***
- Select ***Dial -> Silent Monitor*** from the main menu.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Silent Monitor.***
- Right click the call cell and select ***Dial -> Silent Monitor.***

Call Manager displays the **Silent Monitor** dialog box.

Step 2 Enter an extension or select from the drop-down list.

Step 3 Click the **Silent Monitor** button.

4.8.3 Whisper Page

Whisper Page allows a user to interrupt a user's call and talk with that user without being heard by the other call participant. The initiator can only listen to, speak to, and be heard by the user whose call was interrupted.

The right to initiate a Whisper Page is set by the system administrator. The system administrator also designates users whose calls can be interrupted with a Whisper Page.

To perform a Whisper Page:

Step 1 Perform one of the following

- Click the Application Button, then select ***Dial -> Whisper Page.***
- Select ***Dial -> Whisper Page*** from the main menu.
- Right click the ShoreTel icon in the System Tray and select ***Dial -> Whisper Page.***
- Right click the call cell and select ***Dial -> Whisper Page.***

Call Manager displays the **Whisper Page** dialog box.

Step 2 Enter an extension or select from the drop-down list.

Step 3 Click the **Whisper** button.

4.8.4 Unparking Calls from Other Extensions

Users unpark calls from a monitored user's call stack by pressing a Monitored Extension button. To perform the unparked call function, the Extension Monitor button must be appropriately configured by the system administrator and Call Manager cannot be servicing a connected call.

When the call stack of the monitored extension contains more than one call, the user can view a drop-down menu by pressing the arrow on the right side of the button. The drop-down menu displays contact information for each parked call on the stack. The desired call is unparked by selecting the corresponding entry in the menu.

The Call Manager window in Figure 4-23, contains a Monitored Extension button with an accessed drop-down menu.

Pressing the button without accessing the menu unparks the first parked call.

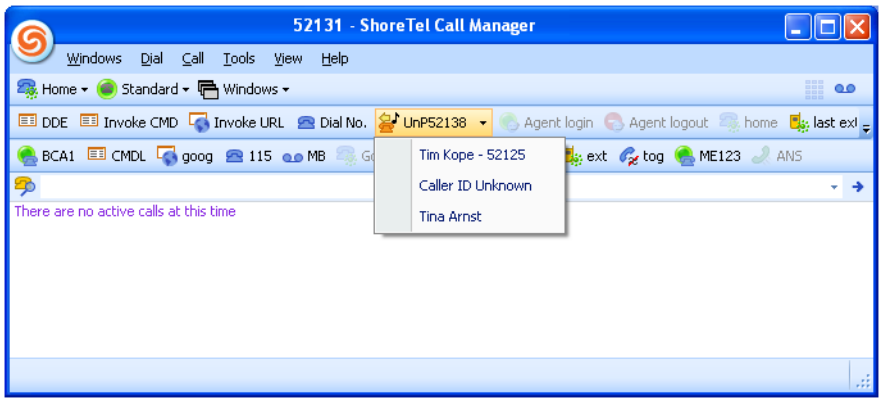

52131 - ShoreTel Call Manager
Windows Dial Call Tools View Help
Home Standard Windows
DDE Invoke CMD Invoke URL Dial No. UnP52138 Agent login Agent logout home last ext
BCA1 CMDL goog 115 MB
Tim Kope - 52125
Caller ID Unknown
Tina Arnst
ext tog ME123 ANS
There are no active calls at this time

Figure 4-23 Unparked Call Button Drop-Down Menu

4.9 History Viewer

The History Viewer displays information about your previous calls. Each History Viewer record in the History Viewer includes the number of an outbound call's destination or inbound call's source along with the start time and duration of each call. History Viewer tools control the display of the calls, manage call records, and initiate calls to numbers listed in the call records.

To open the History Viewer, perform one of the following:

- Click the Application Button and select ***Windows -> History***
- Select ***Windows -> History*** from the Main Menu
- Right click the ShoreTel icon in the System Tray and select ***Windows -> History***
- Press Ctrl+Shift+H

The History viewer opens in the Main window content area or in a Satellite window.

The History Viewer record capacity is 1000 calls. Calls are added to the list when they are completed. When the list contents exceeds the capacity, records are removed in the order they are received when you exit Call Manager.

Call Manager operations available from History Viewer are available through a context menu by right clicking in the viewer table.

4.9.1 History Viewer Components

The History Viewer displays one record for each call that you make or receive, as shown in Figure 4-24. Each row corresponds to one call record. Each column lists one property of the call.

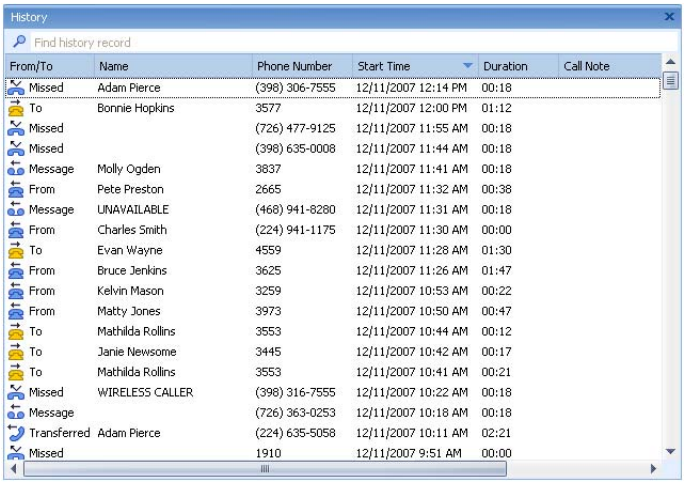


Figure 4-24 History panel

Voice Main Viewer components in Details mode include:

- **Filter bar:** The History viewer displays only entries whose sender name or number match filter bar contents. Filter bar contents are compared to columns that list name and contact information.
- **Column Headings:** Column headings indicate the data field name for the address entries.

- — ***From/To:*** This column displays an icon and label that indicates the call origination or disposition. Available icon labels include *To*, *From*, *Missed*, *Message*, and *Transferred*.
- — ***Phone Number:*** This column lists the number of the other party.
- — ***Name:*** This column lists the name of the party on the other side of the call. If the number matches a directory entry, this column displays the name of the entity.
- — ***Start Time:*** This column lists the time and date that the call was initiated.
- — ***Duration:*** This column lists the duration of the call in minutes and seconds.
- — ***Call Note:*** This column lists a note that was associated with the call. To enter a note for a History Viewer call, right click on the call and select Properties.
- — ***Account Code:*** This column lists the account code associated with a call. You attach an account code at the time of a call by right clicking the call cell.
- — ***GUID:*** The GUID is a number that identifies a call record.
- — ***Trunk:*** This column lists the system trunk through which the call was conducted.

  The Routing Slip is not viewable from the Content table. However, you can view the Routing Slip for a call by right clicking on the call's record and selecting ***Properties.***

Viewer operations that manipulate viewer heading bar contents include:

- — ***To add a column to the table,*** right click in the Contents region and select **Choose Columns**. Then drag the column to be added to the desired location in the Column Heading.
- — ***To sort the contents,*** click in the heading of the desired sort column. Clicking repetitively in the field reverses the order of the sort.
- — ***To move a column to a different heading location,*** click and hold on the column to be moved, then drag the column to the desired location.
- — ***To remove a column from the table,*** click and hold on the column to be removed then drag the column from the table until a large X appears on the column.

- **Contents:** The table below the column headings displays specified properties of your calls. Two viewer modes – Details mode and List mode – are available, as described in Section 4.9.3.

  You can also view information about the call by right clicking on the record and selecting ***Properties.***

4.9.2 Managing History Viewer Records

The following sections describe the file manipulation operations that control the contents of the History Viewer.

4.9.2.1 Deleting a Record

Messages moved to the Deleted folder remain there until 2:00 a.m local (server) time, when ShoreWare removes messages that are at least 6 hours old. Voice mail messages less than six hours old remain in the Deleted folder until 2:00 a.m. the next day.

To move the highlighted message to the deleted folder, right click the record and select Delete Record(s)

4.9.2.2 Clearing the History

You can recover messages in the Deleted folder until ShoreWare removes them from the server during the 2:00 am voice mail maintenance cycle. To recover a message in the Delete folder, move it to the Inbox or Saved folders.

To remove all records from the History viewer, right click in the Contents region and select Clear History.

4.9.2.3 Exporting History Contents

ShoreWare supports the export of History viewer contents to csv files.

Comma-separated values (.csv) file format is a file type that stores tabular data by using commas to delimit data fields. CSV files are supported by most software applications and are convertible to conform to specific requirements.

To export History Viewer contents into a .csv file, right-click in the History Viewer Contents and select Export History from the context menu.

Call Manager responds by converting the directory contents into a .csv file. Your computer then opens that .csv file through the program specified for .csv files through the folder options – typically notepad or MS Excel.

4.9.3 History Viewer Display Options

You control the display of History Viewer components from the context menu generated by right clicking in the content region.

History Viewer display options include:

- **Viewer Mode:** Viewer mode defines the format and contents of the content regions. The History Viewer defines two viewer modes:
  - — ***Details mode:*** In this mode, the History Viewer displays all viewer components described below.
  - — ***List mode:*** In this mode, the History Viewer displays only the Filter bar and Contents. The Contents region displays the Column Headings, Phone Number, Start Time, and Duration. You cannot alter the columns displayed in List mode.

    To select the Viewer mode, right click in the contents region and select ***Details*** or ***List*** in the context menu.
- **Display Properties:** Select this option to display a popup that lists the call properties. This is the only method of viewing a call's routing slip from either mode.
- **Record Grouping:** Select this option to sort the call record by the call type, as specified in the From/To field.
- **Automatic Column Width Adjustment:** Selecting Fit Column Widths to Text adjusts the size of the content columns to display contents of all record fields.

4.9.4 Initiating Calls from the History Viewer

You can dial a previously made call or call back someone who called you from the History Viewer.

To dial the number associated to a History Viewer record, perform one of the following:

- Double click the call record
- Right click on the call record and select the desired number or address at the top of the context menu.

4.10 Call Routing Slips

A call routing slip lists the call's originating and destination information, the duration of the call duration, the list of other extensions that handled the call, and the final disposition of the call. You view an active call's routing slip from the Call Details panel; you view the routing slip of a previous call from the History panel, as described in Section 4.9.1.

To view the Call Details panel for the highlighted call perform one of the following:

- Right click the call cell and select ***More Info*** on the context menu.
- Click the *More Info* icon on the right side of the call cell.
- Click the Application Button and select ***Call -> More Info.***
- Select ***Call -> More Info*** on the Main Menu.
- Right click the ShoreTel Tray icon and select ***Call -> More Info***.

CHAPTER 5

Instant Messaging

5.1 Description

Instant messaging is the real-time transmission of text between two or more system users. Instant messages are sent from and received through a message window. Instant messages do not use call cells. Users can participate in simultaneous multiple chat sessions.

Call Manager provides **IM presence** to indicate user availability for engaging in instant messaging conversations. IM presence is described in Section 6.2.2 on page 78.

The following Call Manager types can send and receive Instant Messages:

- Professional
- Workgroup Agent
- Workgroup Supervisor
- Operator

5.2 The Instant Message Window

The Instant Message window, shown in Figure 5-1, sends and receives text messages. Call Manager displays this window under the following situations:

- the user initiates an instant message conversation
- the user receives the first message of an IM conversation

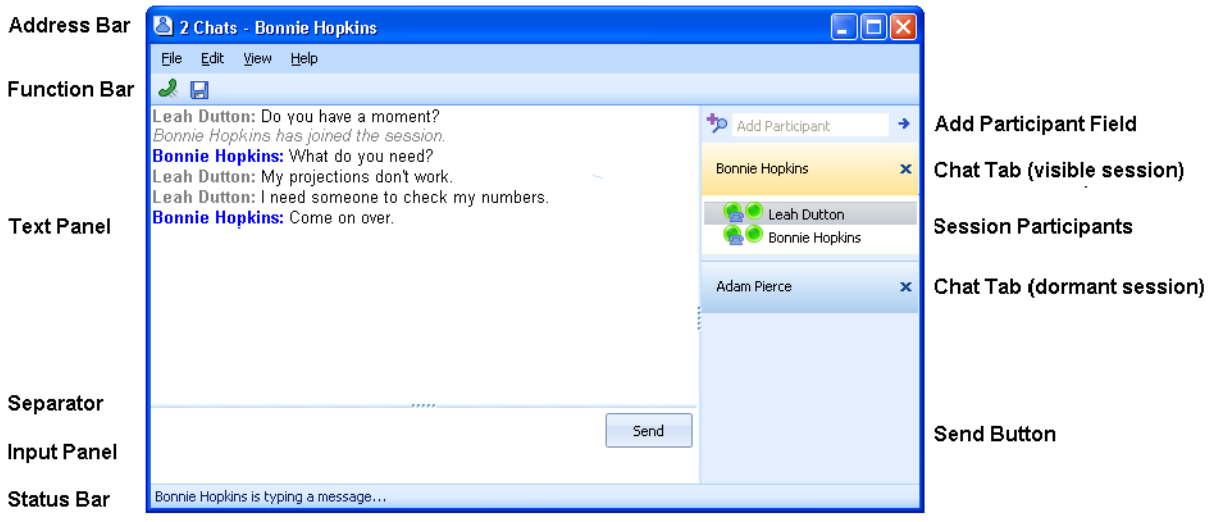


Figure 5-1 Instant Message window components

All IMs of a single conversation are displayed in the same Instant Message window. Closing an IM window erases all messages in the window unless they were previously saved. After closing an IM window, a user can start a new conversation with the same user.

Call Manager options can configure Instant Messaging such that all chat sessions are controlled from a single window or that separate windows are opened for each chat session. Figure 5-1 displays an Instant Message window that controls two sessions; the display of each session is controlled by pressing the chat tabs located on the right side of the panel. The Options and Preferences: Instant Message panel configures the method of displaying multiple chat sessions, as described in Section A.2.13 on page 166.

The contents of a user's IM window is unaffected when other users close their IM windows.

The IM window contains the following components:

- **Address Bar:** displays the party with whom you are conversing.
- **Function Bar:** displays icons for initiating a voice call or for saving the current conversation.
- **Text Panel:** displays previously exchanged messages. Each message is immediately preceded by a header that lists the party that sent the message. The header may also list the time when the message was sent or received.
- **Separator:** divides the text panel and the input panel. You can move the separator bar up or down to adjust the size of the panels.
- **Input Panel:** displays text that you are preparing for the other participant.
- **Add Participant Field:** users are added to the visible chat session by entering their name, number, or address in this field.
- **Chat Tab (visible session):** this tab denotes the chat session displayed in the text panel. The visible session is denoted by yellow background.
- **Session Participants:** this field lists the participants of the chat session displayed in the text field.
- **Chat Tab (dormant session):** this field references a chat session that is not displayed in the text panel and is denoted by the blue background. To activate a dormant chat session, press the chat tab.
- **Send button:** transmits Input panel contents to the other participant. When you press the Send button, input panel contents are moved to the Text panel.
- **Status bar:** provides IM status messages, such as notification that the other participant is typing a message.

5.3 Conducting an IM Conversation

5.3.1 Initiating an IM Conversation

You initiate Instant Messaging conversations from the following Call Manager components:

- **QuickDialer:**
  - — Enter the person's name in the QuickDialer field, then display that person's contact options by clicking the expand icon located left of the presence icon.

    Figure 5-2 displays the Instant Message option for a QuickDialer contact.
  - — Enter sip:<IM ID>, where <IM ID> is the other user's Instant Messaging address.
- **Directory Viewer:** Right click on the desired contact to display a menu that includes an IM option.

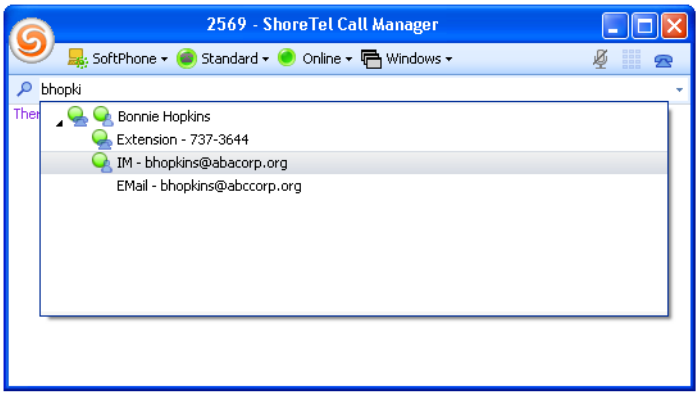


Figure 5-2 Instant Message Option for a QuickDialer contact

- **Call Toolbar**: Pressing the IM button adds an IM to an existing call. This button is inactive when there are no active calls.
- **History**: Right click on the History entry of a desired contact to display a menu that includes an IM option.
- **Contact Viewer**: Right click on the entry of a desired contact to display a menu that includes an IM option. Operator Call Manager also provides a toolbar with an IM button.
- **Call Cell for an active voice call**: Right click on the call cell to display a menu that includes an IM option or click the IM icon located on the right side of the call cell.
- **Voice Mail Viewer**: Right click on a user's name and select IM.
- **Active Call**: During an active call, click the Application button, select the call, and press the IM button.

Call Manager opens a message window when you initiate a conversation.

5.3.2 Receiving the First IM of a Conversation

When you receive the initial message of an IM conversation, Call Manager displays an Alert on the bottom right corner of the monitor. The Alert displays the text of the initial message. Clicking anywhere in the Alert opens an IM window. Figure 5-3 displays an Instant Message Alert.

Instant Messaging alerts are configured on the Options and Preferences: Instant Messages panel. You enable the display of alerts and specify the period that alerts appear on your monitor from this panel.

To dismiss the Alert without responding to the inbound IM, click the X symbol in the upper right corner of the Call Alert. The IM indicator in the taskbar continues flashing until you display the IM window.

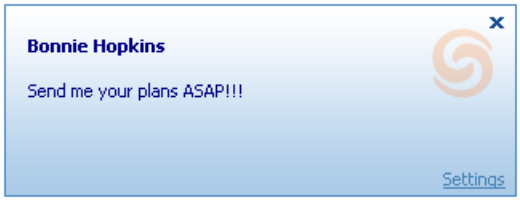


Figure 5-3 Instant Message Alert

5.3.3 Creating and Sending a Message

To create a message, verify that the Message Window is active, then type the text in the input panel at the bottom of the Window.

To send the message, either click the Send button in the bottom right corner of the Message window or press the Enter key

5.3.4 Adding a Participant to a Chat Session

Instant Message session can include two or more participants. To add a participant to an Instant Message session, enter contact information of the new participant in the Add Participant field on the right side of the Instant Message panel, as shown in Figure 5-1, then press the enter button. Subsequent messages are sent to all users listed in the Session Participant list.

5.3.5 Terminating an Instant Message Session

Closing the Instant Message window terminates all Instant Message sessions. When the Instant Message window controls more than one session, individual sessions are terminated by pressing the X icon on the right side of the chat tab.

5.4 Configuring Instant Messaging

5.4.1 Privacy and Control Access

Users control the list of people that can send them IM messages through IM Presence Privacy settings. Contacts that can view a user's IM presence can also send Instant messages to that user.

IM Privacy is described in Section 6.2.2 on page 78.

5.4.2 Instant Messaging Options

The **Options and Preferences: Instant Messaging** panel configures alert and IM window options along with identifying your user name on the server that conducts your instant message conversations. Section A.2.13 on page 166 describes the **Options and Preferences: Instant Messaging** panel.

The **Options and Preferences: Sounds** panel specifies the sound that the computer plays when Call Manager receives an instant message. Section A.2.17 on page 173 describes the Options and Preferences: Sounds panel.

CHAPTER 6

Presence

6.1 Description

Presence is a ShoreWare feature that identifies, uses, and distributes the availability of system users and other personal contacts. Presence information allows users to verify the availability of other users before attempting to contact them. Presence improves overall enterprise productivity by reducing calls to unavailable parties and by providing the enhanced ability to schedule immediate schedule meetings, events, and communication sessions based on the availability of desired participants. Users can also choose when to receive Instant Messages by changing their presence settings.

A user can monitor the presence of a maximum of 500 other contacts. System Administrators configure the number of contacts a user can monitor by setting the maximum contact list size.

6.2 Presence Types

Call Manager defines three presence settings for each user.

- **Telephony presence** indicates user availability for accepting voice calls.
- **IM presence** indicates user availability for engaging in instant messaging conversations.
- **Combined presence** is a single setting that indicates user availability on the basis of Telephony and IM presence status.

Telephony presence is available to users of all Call Manager types. IM presence is available to users of Professional, Operator, Workgroup Agent, or Workgroup Supervisor Call Manager. Director settings control user access to both presence types.

Call Manager implements presence through states and rules. ***Presence states*** indicates user status. ***Presence rules*** define conditions that trigger transitions between presence states. Call Manager defines different presence states for telephony presence and IM presence.

6.2.1 Telephony Presence

Each user is assigned a presence state based on their communication availability. Users cannot manually select a telephony presence state.

ShoreWare assigns a priority level to each presence state. When a user condition triggers a potential transition into multiple presence states, ShoreWare assigns the state with the highest priority to the user.

ShoreWare defines the following Telephony Presence States, listed from highest to lowest priority:

- **Ringing:** This state indicates that the user is receiving an inbound voice call.

  Inbound phone calls trigger a transition to ***Ringing*** from any lower state.

- **Parked:** This state indicates a call is parked on the user's extension.

  Having a call parked on a user's extension triggers a transition to ***Parked*** from any lower state.

- **Held:** This state indicates the user is on a call that is on hold.

  Placing a call on hold triggers a transition to ***Held*** from any lower state.

- **On the Phone:** This state indicates the user is an active participant in a voice call.

  Answering or initiating a voice call triggers a transition to ***On the Phone*** from any lower state.

  Terminating a voice call triggers a transition from ***On the Phone*** to the highest valid state.

- **Do Not Disturb:** This state indicates that, within the user's active Call Handling Mode, the **Call Forwarding Condition** is set to ***Always***.

- **Busy:** This state indicates that the user's Call Handling State is not set to ***Standard***.

  Call Handling Mode changes from Standard trigger a transition to ***Busy*** from ***Online***.

- **Online:** This state indicates that the user's Call Handling State is set to ***Standard***.

  Call Handling Mode changes to Standard triggers a transition to ***Online*** from ***Busy.***

- **NA:** An extension is assigned to an external phone, from which ShoreWare cannot detect the telephony presence.

6.2.2 IM Presence

ShoreWare assigns a presence state to all users that have IM authorization. Presence rules define the conditions that trigger automatic transitions between presence states. Users can also manually change presence states.

ShoreWare defines the following IM Presence States, listed from highest to lowest priority:

- **On the Phone:** This state indicates the user is an active participant in a voice call.

  — ***Answering or initiating a call*** triggers a transition to ***On the Phone*** from any lower state.

  — ***Terminating a call*** triggers a transition from ***On the Phone*** to the highest valid state.

  Users cannot manually enter ***On the Phone***.

- **Manual Transition States:** ShoreWare defines four states to provide specific information as to why the user is unavailable for IM conversations. These states include:

  — Busy
  — Away
  — Be Right Back
  — Out to Lunch

- **Idle:** This state indicates that Call Manager has not detected any keyboard or mouse activity from the user during the period specified by the Idle Status option in the ***Instant Message Preferences and Options*** panel.

  When ShoreWare detects keyboard or mouse activity while the user is in Idle mode, the presence state transitions to the state from which the Idle state was entered.

- **Offline:** This state indicates that the user is not logged into the IM server or has manually set their presence to ***Appear Offline***.

- **Online:** This state indicates that all of the following conditions are true:

  — The user is logged into the IM server.

  — The user is not on a voice call.

  — The user has not manually selected a lower priority state.

  — Call Manager has detected mouse or keyboard activity from the user during a specified period or the user has disabled the Idle Status option in the ***Instant Message Preferences and Options*** panel.

- **N/A:** This state indicates that the user is not configured for instant messaging.

Users view and set their IM Presence from the Assignment bar. The Presence icon is located next to the Call Handling icon, as shown in Figure 6-1. Users change their IM presence state from the drop down menu shown in Figure 6-1.

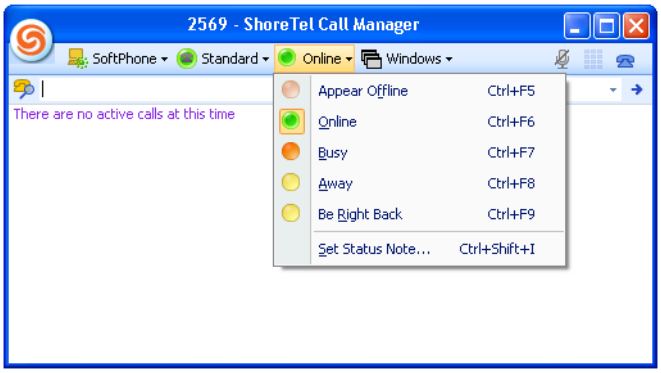


Figure 6-1 IM Presence Icon and Selection Menu

Users can also view and set their IM Presence by clicking the Application Button and selecting IM Presence or by clicking the ShoreTel icon in the System Tray.

Users can attach a status note to their IM Presence State. This note appears in the IM Status column of the Contact List along with the name of the user's current state.

To specify a IM Presence Status Note, perform one of the following:

- Click the Application Button and select ***IM Presence -> Set Status Note***.
- Right click the Call Manager icon in the System Tray and select ***IM Presence -> Set Status Note***.
- Press Ctrl+Shft+I.

6.2.3 Combined Presence

Call Manager displays the combined presence state when configured to show only one presence icon for each user. The combined presence is based upon the user's telephony presence and instant messaging presence states.

The following presence states are listed in priority order, from highest priority (1) to lowest priority (11). The text next to the combined state name specifies the condition that triggers a transition to the state.

1. **In a Call**: Telephony state – ***On the Phone***, ***Held / Park***, or ***Ringing*** states.
2. **Do Not Disturb**: Instant Messaging state – ***Do Not Disturb***
3. **CFA VM (*Call Forward Always*)**: Telephony state – ***Do Not Disturb***
4. **Busy**: Instant Messaging state – ***Busy***
5. **Be Right Back**: Instant Messaging state – ***Be Right Back***
6. **Away**: Instant Messaging state – ***Away***
7. **Call Handling Mode**: Telephony state – ***Busy***

   This state is valid if the user's active call handling mode is not ***Standard***.
8. **Idle**: Instant Messaging state – Idle
9. **Callable**: Telephony state – Available
10. **Available**: Telephony and Instant Messaging states – do not care
11. **Unknown**: Telephony and Instant Messaging states – unknown

Transition to a presence state requires that no higher priority states are valid.

Example: When the Telephony state is ***Active*** (1) and the Instant Messaging state is ***Do Not Disturb*** (2), then the Combined state is ***In a Call*** (1).

6.3 Displaying Presence

6.3.1 Configuring Display Options

Users can specify the presence information they publish through Option and Preference Presence options. Available options include displaying both presence settings, either of the settings, or a blended setting.

Call Manager displays presence information in the following components:

- Assignment bar, as shown in Figure 6-1.
- Contact viewer displays the IM and telephony presences of the users' contacts. Hovering the cursor over an icon displays a popup that lists the active presence state.
- Make New Call dialog panel.
- Agent Monitor (telephony presence only).
- Redial drop down list in QuickDialer, as shown in Figure 6-2.
- Auto suggest list in QuickDialer.

Call Manager automatically adjusts the presence status of users as they use system resources. Users can also manually adjust their status at any time.

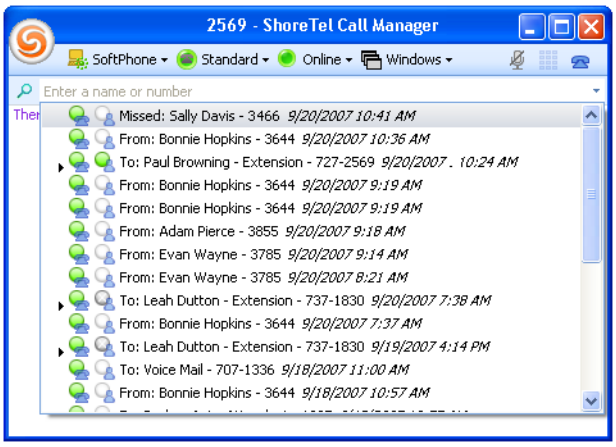

2569 - ShoreTel Call Manager
SoftPhone
Standard
Online
Windows
Enter a name or number
Missed: Sally Davis - 3466 9/20/2007 10:41 AM
From: Bonnie Hopkins - 3644 9/20/2007 10:36 AM
To: Paul Browning - Extension - 727-2569 9/20/2007 . 10:24 AM
From: Bonnie Hopkins - 3644 9/20/2007 9:19 AM
From: Bonnie Hopkins - 3644 9/20/2007 9:19 AM
From: Adam Pierce - 3855 9/20/2007 9:18 AM
From: Evan Wayne - 3785 9/20/2007 9:14 AM
From: Evan Wayne - 3785 9/20/2007 8:21 AM
To: Leah Dutton - Extension - 737-1830 9/20/2007 7:38 AM
From: Bonnie Hopkins - 3644 9/20/2007 7:37 AM
To: Leah Dutton - Extension - 737-1830 9/19/2007 4:14 PM
To: Voice Mail - 707-1336 9/18/2007 11:00 AM
From: Bonnie Hopkins - 3644 9/18/2007 10:57 AM

Figure 6-2 QuickDialer Presence Icons

The **Options and Preferences: Instant Messaging – Presence** panel specifies the presence icons that Call Manager displays and the inactivity period that triggers the Idle state transition. Section A.2.13.2 on page 168 describes the **Options and Preferences: Instant Messaging – Presence** panel.

6.3.2 Presence Change Alerts

Users can mark a contact to determine when that contact has terminated a phone call or an instant message session. Call Manager then informs the user when the contact has changed their presence. Users that can access a contact's IM presence information receive notification of IM or telephony presence changes. Users that are denied access to a contact's presence information can only receive notification of that contact's telephony presence change.

To mark a contact for a presence change alert, right click the desired contact in the Contact List and select Alert When Available on the context menu. If that contact is on the phone or in an Instant Message session, Call Manager displays the popup shown in Figure 6-3 when that contact completes the call or session. If that contact is not on the phone or a session, the popup is displayed after the contact subsequently begins a call or session, then terminates it.

Pressing the snooze button closes the popup for the period listed on the button. If the contact is still available after the period elapses, the popup is displayed again. If the contact is not available, the popup is displayed immediately after the contact becomes available.

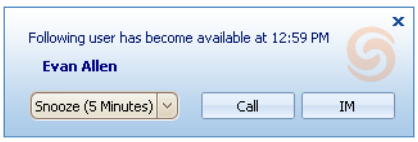


Figure 6-3 Presence Change Alert popup

6.4 IM Presence Privacy

IM Presence Privacy provides users the capacity to manage the visibility of their IM presence status. Restricting access to IM Presence information also prevents blocked users from sending instant messages to users restricting their access.

6.4.1 Privacy States

Presence privacy states define the IM interaction status between two system users. Users restrict access to their IM presence state by assigning a privacy state to other users. ShoreWare defines the following presence privacy states:

- **Allowed**: This state indicates that the requested party has received access to the user's IM presence status.
- **Blocked**: This state indicates that the requested party was denied access to the user's IM presence status.

  A user's IM presence state appears as ***Offline*** to all users whose state *Don't Show Status*.
- **Pending**: This state indicates that the user has not responded to the party's request for IM presence status.

  Until the requested user responds to a presence request, the presence state of that user depends on the type of presence server that the user accesses:

  — **OCS 2007**: Contact's presence is displayed until access is blocked
  — **Converged Conferencing 7.1**: Presence state is offline until access is allowed

The default setting is *Blocked*.

6.4.2 Responding to Presence Access Requests

Call Manager provides the following methods of requesting access to a user's presence state:

- adding the user to the Contact List
- calling the user
- sending the user an Instant Message

Administrators can configure Class of Service options to require users to approve privacy requests or to automatically accept all requests to a user. Users that are required to approve privacy requests are only able to view other users privacy from the Contact List.

Contacts that are denied access to a user's presence information appear as ***Offline*** in the user's contact List and QuickDialer fields. Contacts can send instant message to only users that grant them access to presence privacy information.

A popup window notifies the recipient concerning a presence access request. The recipient responds to the request by marking the checkboxes of contacts, then pressing the OK button. Contacts that are not checked when the OK button is pressed are denied access to the user's presence information. Figure 6-4 displays a privacy request notification popup.

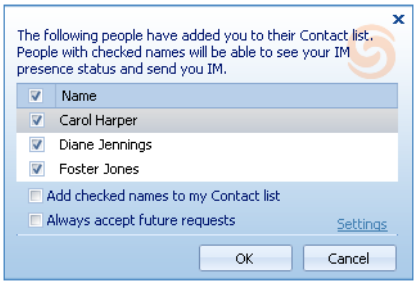

The following people have added you to their Contact list. People with checked names will be able to see your IM presence status and send you IM.
Name
Carol Harper
Diane Jennings
Foster Jones
Add checked names to my Contact list
Always accept future requests
Settings
OK
Cancel

Figure 6-4 Notification popup

The bottom two parameters provide options for adding checked contacts to the user's Contact List and to automatically accept all future presence privacy requests.

6.4.3 Managing the Privacy Access List

The Options and Preference: Instant Messaging Privacy panel, as shown in Figure 6-5, displays contacts that are allowed or denied access to a user's Presence Privacy information. Refer to Section A.2.13.3 on page 169 for a description of the Options and Preference: Instant Messaging Privacy.

The table on the right side of the panel displays contacts for whom the user has granted or denied presence information access. The data field immediately above the table filters contacts displayed on basis their access to presence information. Users can add contacts to the list by pressing the Add button at the bottom of the panel. The status of a contact's access can be changed by highlighting that contact in the list and pressing the Allowed or Blocked button located at the bottom of the panel. Contacts are removed from the list by pressing the Delete button.

Users do not receive instant messages from contacts whose privacy state is *Blocked*. Presence access requests are also blocked from these users.

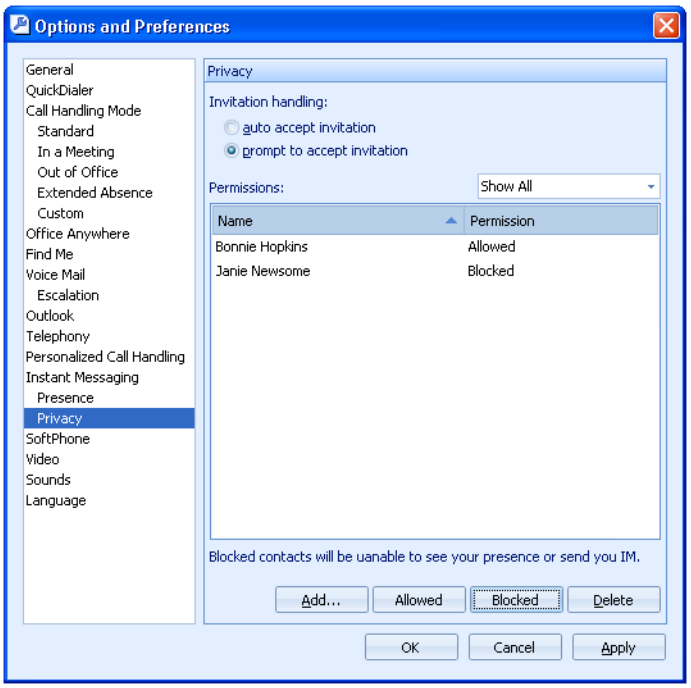


Figure 6-5 Instant Messaging Privacy panel

6.4.4 Access Request Settings

Although presence privacy settings are configured by each user, ShoreWare provides tools for administering IM presence access requests on a system or user basis. Presence access requests for the entire ShoreTel system are administered through by the system administrator, which may affect Call Manager configuration settings. Refer to your system system administrator for configuration information about your system.

Users control automated acceptance of IM presence access settings from the **Options and Preferences: Instant Messaging – Privacy** panel. Section A.2.13.3 on page 169 describes the **Options and Preferences: Instant Messaging – Presence** panel.

CHAPTER 7

SoftPhone

7.1 Introduction

SoftPhone is a Call Manager software component through which you participate in voice calls and listen to messages over your computer through a headset or speakers with a microphone. SoftPhone is a licensed feature that is enabled by your system administrator.

7.2 Using the SoftPhone

7.2.1 Assigning SoftPhone to Your Extension

To assign SoftPhone to your extension, perform one of the following actions:

- Click the Application Button and select ***Extension Assignment -> SoftPhone.***
- Click the Assignment button on the Assignment Bar and select ***SoftPhone*** on the drop down menu, as shown in Figure 7-1.
- Right click the ShoreTel icon in the System Tray and select ***Extension Assignment -> SoftPhone***
- Press Ctrl+Shift+S

The Assignment button displays the SoftPhone icon to indicate that your extension is assigned to the SoftPhone.

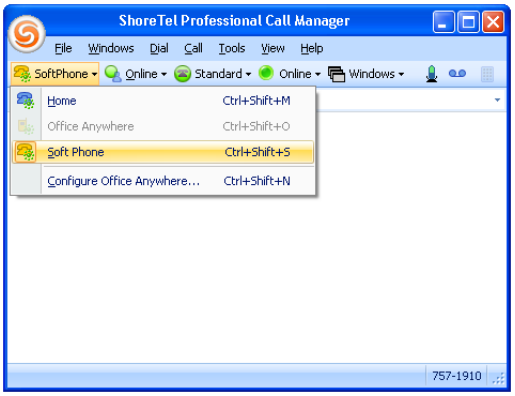


Figure 7-1 Activating SoftPhone from the Extension bar

7.2.2 Managing SoftPhone Calls through Call Manager

You initiate, control, and terminate voice calls through SoftPhone by performing Call Manager operations, as described in Chapter 4.

7.2.3 Keypad

The Call Manager keypad, located on the right side of the Assignment bar, has twelve keys labeled 0 to 9, *, and #. Pressing a key sends a DTMF tone to the other party of the voice call. You cannot initiate a voice call with the keypad.

7.2.4 Muting the SoftPhone

Muting the SoftPhone disables the microphone, allowing you to continue listening to the other party without being heard. The SoftPhone Mute button is on the right side of the Assignment bar, as shown in Figure 7-2. In addition to controlling your microphone, the Mute button displays the mute status.

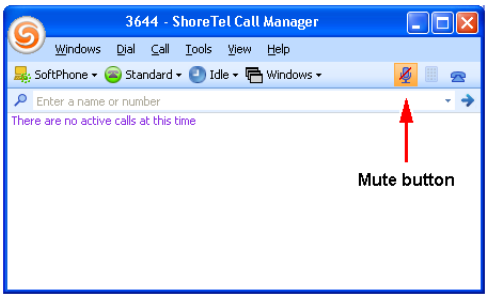

3644 - ShoreTel Call Manager
Windows Dial Call Tools View Help
SoftPhone Standard Idle Windows
Enter a name or number
There are no active calls at this time
Mute button

Figure 7-2 Mute Button in the Main Window

- **To mute the SoftPhone**, press the ***Mute*** button.
- **To enable the muted SoftPhone microphone**, press the ***Mute*** button.

Figure 7-3 displays the Mute button when SoftPhone is ***muted*** and ***not muted*** states.

Figure 7-3 Mute button states

7.3 Configuring SoftPhone

The **Options and Preferences: SoftPhone** panel specifies the computer sound devices and network adapter used by SoftPhone. Section A.2.15 on page 171 describes the Options and Preferences: SoftPhone panel and the SoftPhone configuration parameters on the panel.

CHAPTER 8

Managing Address Entries

8.1 Introduction

Call Manager provides three viewers for organizing and displaying address information of ShoreWare system users and other personal contacts. You can also initiate and manage communication sessions through these viewers.

- The **Directory viewer** displays all system users and personal contacts. You can also display Outlook contacts in the Call Manager directory.
- The **Contact viewer** displays selected Directory entries to provide convenient access to frequently accessed entries.
- The **Speed Dial viewer** provides a list of entries that you can initiate contact through pressing a single phone button. You can also initiate calls from this viewer.

This chapter describes the Call Manager address viewers.

8.2 Directory Viewer

The Directory Viewer displays contact information for all entities listed in all rosters available to your user account, including the system user directory, Outlook contacts, and personal entries that you add. You can view and modify contact information, initiate communication sessions, and send messages to directory entities from the Directory Viewer.

To open the Directory Viewer, perform one of the following:

- Click the Application Button and select ***Windows -> Directory***
- Select ***Windows -> Directory*** from the Assignment Bar
- Select ***Windows -> Directory*** from the Main Menu
- Right click the ShoreTel icon in the System Tray and select ***Windows -> Directory***
- Press Ctrl+Shift+D

The Directory viewer opens in the Main window content area or in a Satellite window.

8.2.1 Directory Components

The Directory Viewer displays a list of contacts, as shown in Figure 8-1. Each row corresponds to one address entry. Each column lists one directory entry property. You can customize the Directory viewer to display a subset of the available columns.

Columns that the Directory viewer can display include:

- **Data Source:** This field indicates where source of the contact – system extensions; imports from your Outlook contact list or address book; or user created entries.
- **Company**

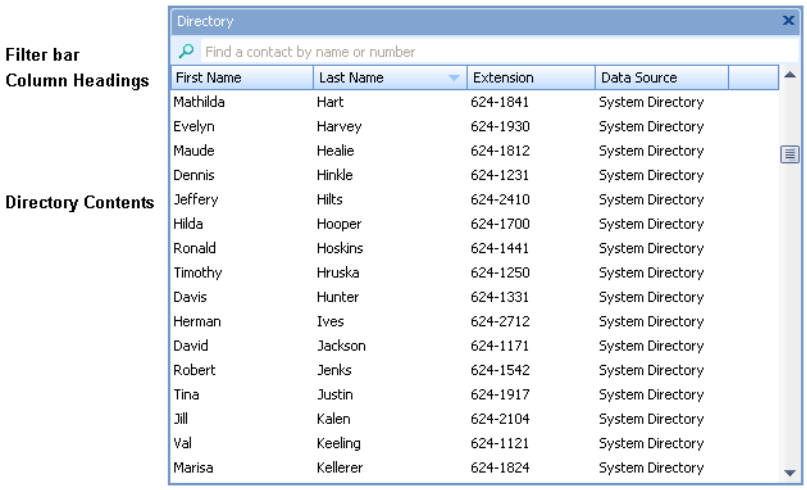

Filter bar
Column Headings
Directory Contents
Directory
Find a contact by name or number
First Name
Last Name
Extension
Data Source
Mathilda Hart 624-1841 System Directory
Evelyn Harvey 624-1930 System Directory
Maude Healie 624-1812 System Directory
Dennis Hinkle 624-1231 System Directory
Jeffery Hilts 624-2410 System Directory
Hilda Hooper 624-1700 System Directory
Ronald Hoskins 624-1441 System Directory
Timothy Hruska 624-1250 System Directory
Davis Hunter 624-1331 System Directory
Herman Ives 624-2712 System Directory
David Jackson 624-1171 System Directory
Robert Jenks 624-1542 System Directory
Tina Justin 624-1917 System Directory
Jill Kalen 624-2104 System Directory
Val Keeling 624-1121 System Directory
Marisa Kellerer 624-1824 System Directory

Figure 8-1 Directory Viewer

- First Name
- Middle Name
- Last Name
- Department
- Extension
- Business
- Mobile
- email
- IM

Directory viewer components include:

- **Filter bar:** The Directory viewer displays only entries whose information, in specified columns, matches text in the filter bar. Filter bar contents are compared to columns that list name and contact information. Column contents are compared to filter bar contents regardless of their display status.
- **Column Headings:** Column headings indicate the data field name for the address entries.
  - — ***To add a column to the table,*** right click in the Directory Contents region and select Choose Columns. Then drag the column to be added to the desired location in the Column Heading.
  - — ***To sort the Directory Contents,*** click in the heading of the desired sort column. Subsequent clicking in the heading reverses the order of the sort.
  - — ***To move a column to a different heading location,*** click and hold on the column to be moved, then drag the column to the desired location.
  - — ***To remove a column from the table,*** click and hold on the column to be removed then drag the column from the table until a large X appears on the column.
- **Directory Contents:** The table below the column headings displays address information for the contacts that are accessible to Call Manager. Directory contents may be provided from three sources:
  - — ShoreWare system users. You cannot remove or edit these entries.
  - — Personal contacts added by the user.
  - — Outlook Contacts when Outlook Contact Import is enabled.

In addition to performing column heading sorts, you can group address entries by Company or Data Source. When address entries are grouped, the field by which the contents are grouped is listed as a data entry field instead of a column heading.

— ***To group Directory Contents,*** right click in the Directory Contents table and select *Group By -> Company* or *Group By -> Data Source*.

— ***To turn off grouping,*** right click in the Directory Contents table and select *Group By -> Don't Group*.

8.2.2 Managing the Directory

The Directory viewer includes a tool for exporting all directory entries to a .csv file. You can also add directory entries to your Contacts viewer from the Directory viewer.

8.2.2.1 Exporting the Directory to a .csv File

Comma-separated values (.csv) file format is a file type that stores tabular data by using commas to delimit data fields. CSV files are supported by most software applications and are convertible to conform to specific requirements.

To export Directory viewer contacts into a .csv file, right-click the Directory Contents and select ***Open as Text***.

Call Manager responds by converting the directory contents into a .csv file. Your computer then opens the .csv file through the program specified by your folder options – typically notepad or MS Excel.

8.2.2.2 Importing Directory Entries from a File

Call Manager supports the import of contact entries contained in a tab-delimited file. The first row in the file must list column headings for which contact information is provided by the file. Only data that corresponds with a column headings that match a pre-defined Call Manager column heading will be imported into the directory. To view the available column headings, refer to the Column Heading bullet item in Section 8.3.2.2 on page 93.

To import contacts from a Tab-Delimited File:

Step 1 Open the Directory Viewer

Step 2 Open the Import Directory wizard by righting click in the contact table and selecting Import.

Step 3 Click the Browse button and navigate to locate the file to be imported.

Step 4 Press the Next button.

8.2.2.3 Adding Directory Entries to the Contact List

Contact groups are subsets of your Directory that provide convenient access to selected Directory entries, as described in Section 8.3. You can add Directory entries to contact groups from the Directory viewer.

To add a Directory entry to a contact list:

Step 1 Select an entry in the Director Viewer.

Step 2 Right-click the entry and select *Add as a Contact*.

Step 3 Select the contact list from the menu list, as shown in Figure 8-2.

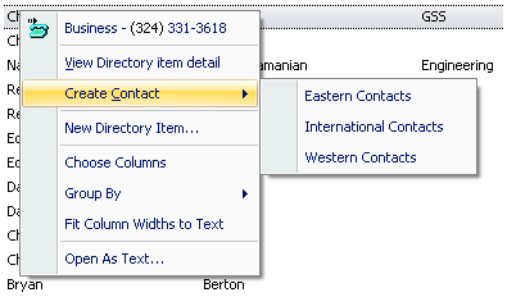


Figure 8-2 Directory Context Menu – Selecting a Contact Group

You can also add an entry to a contact group by dragging a Directory entry into the desired group in the Contact Viewer.

8.2.3 Managing Personal Directory Entries

In addition to displaying system users and your Outlook contacts, the Directory viewer lists address entries for contacts that you add to your directory. The Directory viewer indicates address entries that you added to the Directory by specifying the **Data Source** as *Personal Directory*.

You can add, edit, and remove personal address entries through the ***Directory Viewer***. You cannot change the name or contact information for System Directory entries or addresses imported from Outlook. You cannot remove System Directory entries or addresses imported from Outlook.

To add a personal contact to the Directory Viewer:

Step 1 Right-click in the Directory Contents and select *New Directory Entry*.

Call Manager displays the **Directory item details** panel, shown in Figure 8-3.

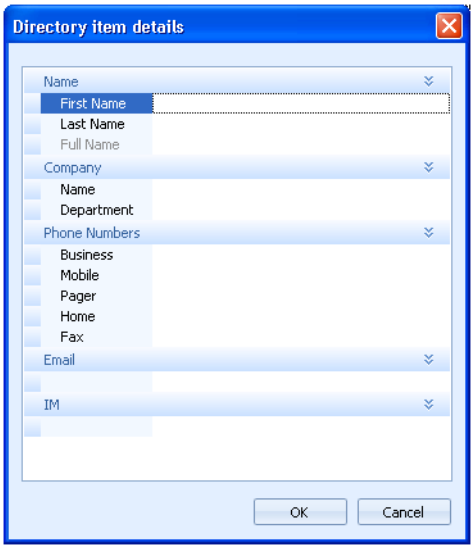


Figure 8-3 Directory items details panel – adding a new entry

Step 2 Enter the address information for the new personal contact.

Step 3 Press the OK button to add the address entry to your directory.

To edit contact information for a personal contact:

Step 1 Right-click a Directory viewer entry and select *View Directory Item Detail*.

Call Manager displays the **Directory item details** panel for the contact, as shown in Figure 8-4. The text at the top of the panel indicates the edit status of the entry.

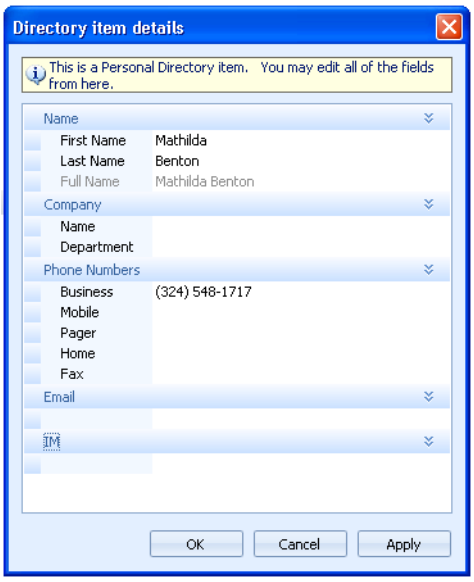


Figure 8-4 Directory items details panel – editing an existing entry

Step 2 Modify the desired data fields.

Step 3 Press the OK button to modify the address entry in your directory.

To delete a Personal contact, right-click the desired Directory entry and select *Delete Directory Item(s)*.

8.2.4 Initiating Calls through the Directory Viewer

You can initiate communication sessions to contacts through the Directory viewer. Communication sessions that you can initiate through Directory viewer include:

- Voice calls to extensions and other phone numbers
- Instant Messages
- Voice Messages
- Email messages

To initiate communication session to a Directory viewer contact, perform one of the following:

- Double click a Directory viewer entry to initiate a voice call
- Right-click a Directory viewer entry to display the context menu.

The context menu, as shown in Figure 8-5, displays the contact methods defined for the user in the Directory viewer. The context viewer in Figure 8-5 provides a business phone number, mobile phone number, home phone number, another phone number, and an email address. Click on the desired address to initiate the specified communication session.

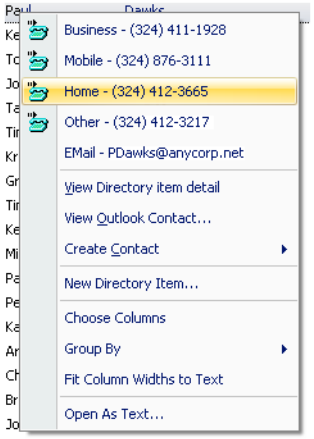


Figure 8-5 Directory Context Menu – Initiating a Communication Session

8.3 Contact Viewer

The Contact Viewer provides access to Contact Groups, which are subsets of your directory entries. Contact Groups provide convenient to directory entries that you frequently reference. The Contact Viewer is available to Professional, Workgroup Agent, Workgroup Supervisor, and Operator types of Call Manager.

This section describes basic Contact Viewer functions. Chapter 10 describes Contact Viewer functions available only to Workgroup Agent, Workgroup Supervisor, and Operator.

To open the Contact Viewer, perform one of the following:

- Click the Application Button and select ***Windows -> Contacts***
- Select ***Windows -> Contacts*** from the Main Menu
- Select ***Windows -> Contacts*** from the Assignment bar
- Right click the ShoreTel icon in the system tray and select ***Windows -> Contacts***
- Press Ctrl+Shift+C

The Contact viewer opens in the Main window content area or in a Satellite window.

8.3.1 Contacts

Contacts are address entries selected from directories accessible to Call Manager, including the system directory, your personal directory and Microsoft Outlook. Contact Groups are accessed from the Contacts Viewer and provide quick access to address entries without navigating through the comprehensive directory. Users can perform tasks on Contact Group entries such as initiating voice call or instant messages, handling active calls, and sending email or voice messages.

Contacts are divided into ***Contact Groups***. Call Manager requires the definition of at least one Contact Group; the initial default Contact Group is named ***Contacts***. You can create, rename, or delete Contact Groups.

The Contact Viewer displays the complete Contact List through a collapsible tree structure that lists the defined Contact Groups. The tree can be expanded to view the contents of selected Contact Groups.

A Contact can be placed in multiple Contact Groups. Contact groups cannot contain subgroups.

8.3.2 Contact Viewer Components

The Contact Viewer displays Contact List contents. You can manage your contacts and communication sessions with your contacts from the Contact viewer.

8.3.2.1 Viewer Modes

Call Manager provides the following Contact Groups views:

- **Details –** Each attribute is listed in an individual column, similar to the traditional Windows Explorer column view. Contacts can be sorted in this view by clicking the column headings at the top of the list.
- **List –** Contacts are displayed in a single column that shows the Contact name and the presence status. Contacts are listed alphabetically in this view.

  List is the default view.
- **Small Icons –** This view displays all Contacts without separating them into Contact Groups. Presence is displayed using small icons.
- **Large Icons –** This view displays all contacts without separating them into Contact Groups. Presence is displayed using large icons.

Each view includes a filter bar, similar to QuickDialer, that filters the Contact Groups to entries that match filter bar contents. Figure 8-6 displays a Contact viewer in Details mode.

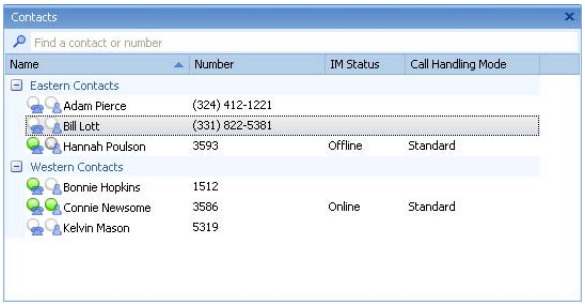


Figure 8-6 Contact Viewer – Details mode

To select a Contact viewer mode, right-click in the Contacts area and select the desired viewing mode.

8.3.2.2 Viewer Components

The components that are visible on the Contact viewer depends on the viewer mode. The following is a list of Contact viewer components:

- **Filter bar**: The Contact viewer displays only entries whose information matches the text in the filter bar. Filter bar contents are compared to columns that list name and contact information for the entries, regardless of the appearance of the contact information in the current viewer mode.

All Contact viewer modes display the Filter bar.

- **Column Headings:** Column headings indicate the data field name for the address entries.
  - — ***To add a column to the table,*** right click in the Contents region and select ***Choose Columns***, then drag the column to be added to the desired location in the Column Heading.
  - — ***To sort the contents,*** click in the heading of the desired sort column. Subsequent clicking in the field reverses the order of the sort.
  - — ***To move a column to a different heading location,*** click and hold on the column to be moved, then drag the column to the desired location.
  - — ***To remove a column from the table,*** click and hold on the column to be removed then drag the column from the table until a large X appears on the column.

  Column Headings are visible in the Details viewer mode.
- **Contact Group bar:** In viewer modes that separate the contacts by group, the Group bar indicates the Contact Group to which the successive contacts belong. The Contact viewer in Figure 8-6 displays two contact groups: Eastern Contacts and Western Contacts. Each group comprises three contacts.

  Contact Group bars are visible in the Details and List viewing modes.
- **Contacts:** The contact table displays each of the defined contacts in your lists, along with Presence icons specified in the Preferences and Options panel. Viewing modes that display Contact Group bars can hide all contacts within a group by pressing the collapse button located left of the group name.

  All viewing modes display the defined contacts. The information listed with each contact and the appearance of the icons depend upon the selected viewing mode.

8.3.3 Managing Contacts

8.3.3.1 Adding Entries to the Contact List

Contacts are added to a Contact List through each of the following actions:

- Right click on an entry in the Directory viewer and select ***Add as a Contact***.
- Open the **Add Contact** panel, shown in Figure 8-7, by right clicking in the Contact List and selecting ***Add Contact***.

  The radio button options at the top of the panel specify the source of the new contact.
  - — **Create a new contact from scratch.** Select this option when information for the new contact is not in the Directory List. Call Manager also creates a Personal Directory entry for the contact when you select this option.
  - — **Link this contact to an existing Directory Entry.** Select this option to add a contact that exists in the Directory viewer.

    The panel displays a data entry field directly below the option text. Enter the name, extension, or address of the Directory entry to be added to the Contacts List in this field. All other data fields are filled with the Directory entry information. Data fields are editable for Personal Directory entries. Data fields are not editable for System or Outlook Directory entries.

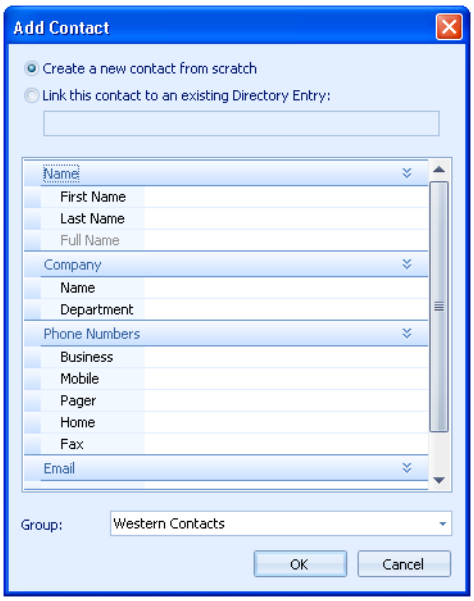


Figure 8-7 Add Contact panel

- Drag a name from the Directory viewer into the Contact viewer. If the Directory window and the Contact List are in the same Content Area, dragging entries over the Contacts tab switches the view to the Contact List.

  This method is available only in Operator, Workgroup Agent, or Workgroup Supervisor Call Manager.

8.3.3.2 Editing a Contact Entry

You can edit the contact information for Personal contacts in the ***Directory Viewer*** or *Contact Viewer*. You cannot change the name or contact information for System Directory contacts or addresses imported from Outlook. You can change the default number from this panel for all contacts.

To edit Contact address information through the Contact viewer:

Step 1 Right-click on the selected entry in the Contact viewer and select ***More Info*** from the context menu

Call Manager responds by displaying the Contact Properties panel for the contact, as shown in Figure 8-8. The text at the top of the panel indicates the edit status of the entry.

Step 2 Modify the desired data fields.

Step 3 Select a default phone number by clicking left of the label of the desired number. This field is editable for all contacts.

The checkmark located left of a phone number indicates the number that Call Manager calls when you double-click a Contact viewer entry.

Step 4 Press the ***OK*** button to change the Contact and Directory information.

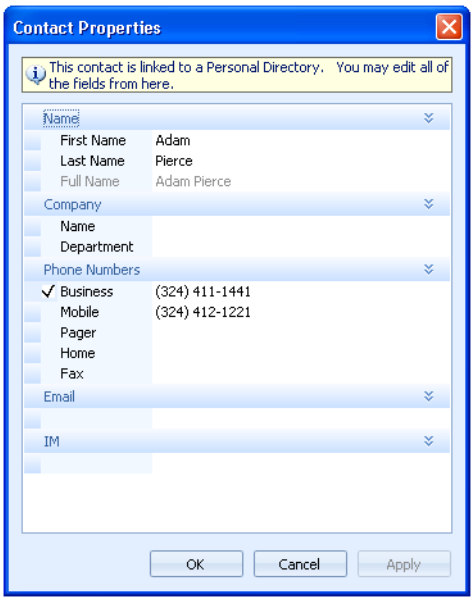


Figure 8-8 Edit Contact Entry panel

8.3.3.3 Removing a Contact Entry

Deleting entries from a *Contact List* makes them inaccessible from the Contact Viewer. Removing an entry from the a Contact List does not affect its corresponding Directory entry. You can remove any contact from the contact list.

To delete a Contact, right-click the desired contact and select ***Delete Contact***.

8.3.4 Contact List Operations

The list of operations that you can initiate through the Contact viewer include:

- Initiate an instant message conversation
- Send an email message
- Initiate a voice call
- Initiate a video call
- Pickup a call
- Unpark a call
- Send a voice message
- Send an Intercom message
- Barge In
- Silent Monitor
- Whisper Page
- Record a voice call
- Remove a contact from the contact list.

To initiate a voice call to a contact's default number, perform one of the following:

- Double-click on the name of the desired contact.
- Drag and drop the name of the desired contact into the ***Active Call Area*** in the Main Window.

To initiate a voice call to any of the contact's number or to initiate any other caller operation, right click on the desired contact and select the operation or phone number from the context menu.

8.4 Importing Contacts from other applications

Call Manager supports the import of data records from CSV or XML files for display in the Directory Viewer. The CSV and XML files contain lists of contacts and are formatted specifically for integration with Call Manager.

The CSV and XML files are not modified by the import process, nor are the contacts permanently added to the user's Call Manager database.

Call Manager caches CSV or XML file contents at start-up and after each file change. The data is available in the Directory Viewer, Contacts Viewer, and QuickDialer. Call Manager reports errors during the cache process to the user and in log files. Call Manager receives records from all properly formatted CSV and XML files in the target directory.

ShorePhones do not display records imported from other applications.

8.4.1 Implementation

The following sections describes the steps required for Call Manager to import records from a data file. Section 8.4.2 describes the properties of CSV and XML import files.

8.4.1.1 Editing the Registry

Call Manager reads data files located in a directory specified by the following registry key:

Location: HKEY_CURRENT_USER\Software\Shoreline Teleworks\ShoreWare Client
Key: ContactImportLocation.

The value in this registry is a string. The default value of this key is a string that points to the Contacts directory in the user profile directory:

C:\Documents and Settings*username*\Application Data\ ShoreWare Client\Contacts

The registry entry can point to a PC location or a server path.

Call Manager does not automatically create this key or assign a default value to it. This registry must be created and assigned to location of the contact files before Call Manager can import data records from the file.

WARNING Windows registry changes are effective immediately, and backups are not created automatically. Only experienced personnel should attempt registry changes.

Figure 8-9 displays the registry editor after insertion of the ContactImportLocation key. This registry is set up such that Call Manager will import records from CSV and XML files located in Bonnie Hopkin's CM_Import folder.

8.4.1.2 Placing the File

Properly configured CSV and XML Files placed in the folder specified by the ContactImportLocation key are immediately cached to Call Manager. Changes to these files are visible when the edited file is saved.

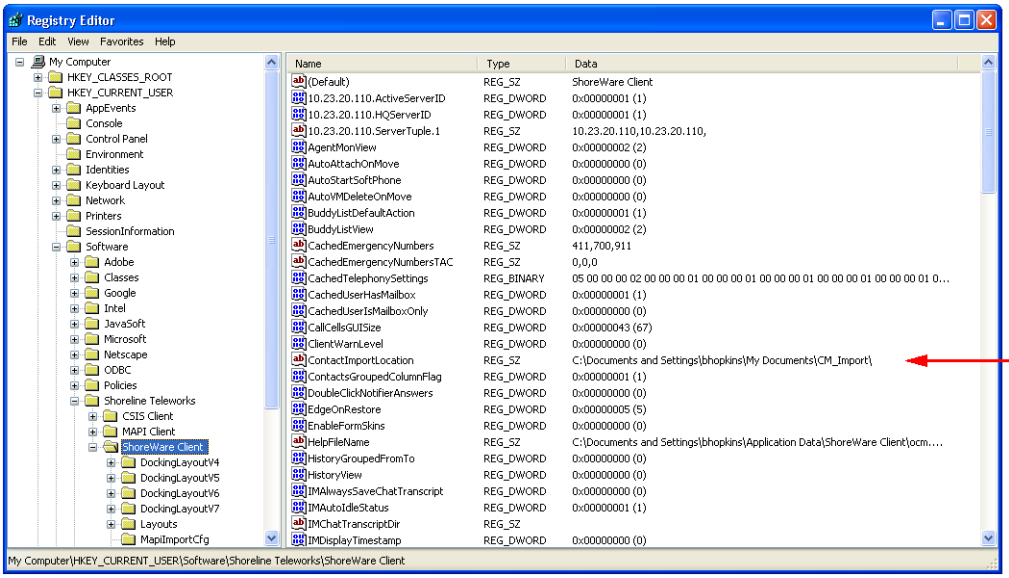


Figure 8-9 ContactImportLocation key viewed in the Registry Editor

When a file is removed from the folder, the contacts listed in that file remain in the Directory Viewer until Call Manager is exited. Contacts removed from a file also remain in the Directory Viewer. When Call Manager is started again, all records removed by contact deletion or file removal do not appear in the Directory Viewer.

8.4.1.3 Viewing the Contacts

Directory View

Contacts imported from CSV or XML files appear in the Directory Viewer, as shown in Figure 8-10. When contacts are grouped by data source, they appear under a heading that lists the Data Source. When the contacts are grouped by company or not grouped, the Data Source column indicates either the name of the originating file or the contents of the Name field in the originating file.

Directory Item Details

Details of contacts imported from the CSV or XML files are visible from the Directory Item Details panel, access by right clicking a contact and selecting **View Directory Item Detail**. The Directory Item Details panel, as shown in Figure 8-11, indicates the source of the file in the first data field and states that the record contents are not editable.

Quick Dialer

The imported CSV/XML file contacts will be available in all QuickDialer controls. They will appear in the list just like any other contact.

8.4.2 File Properties

8.4.2.1 CSV Files

CSV files contains records, each of which consists of data fields. The following sections describe the composition of CSV file fields and records.

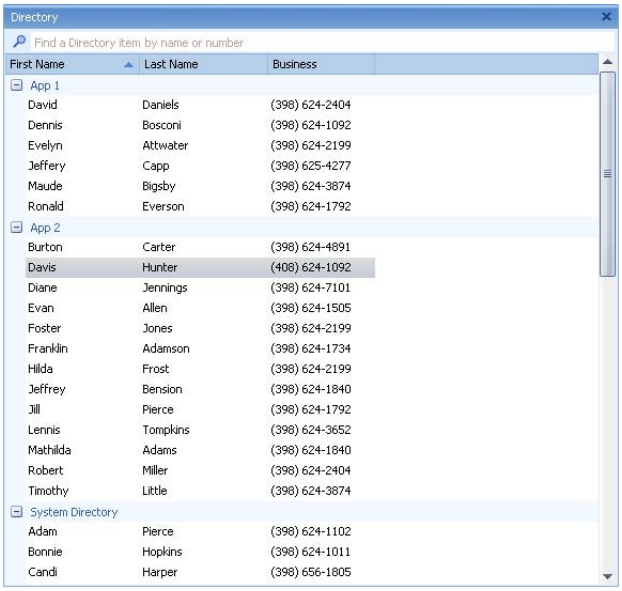


Figure 8-10 Directory Viewer containing Imported Records

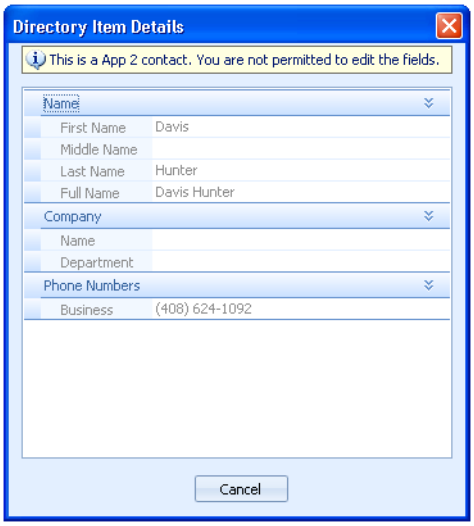


Figure 8-11 Directory Item Details

Field Composition

Each field denotes one property for the file or for one contact. The field entries must conform to the following syntax rules:

- Data is of type ***strings*** and supports UTF-16 encoding.
- Fields that contain a double quote must be surrounded by double quotes. Double quotes are indicated by two double quotes.

  Example 1: A “tiny” space -> “A ““tiny”” space””
  Example 2: “Joe” -> ““Joe””“
  Example 3: “Red” Wagon -> ““Red”” Wagon”
- Fields that contain commas must be surrounded by double quotes.

Example 1: "ShoreTel, Inc."

- Fields that do not contain double quotes or commas with double quotes may be surrounded with double quotes.
- Data fields with no information translate into blank entries in Call Manager

Record Types

Each line in a CSV files corresponds to one data record. The end of a record is denoted by a Carriage Return and Line Feed.

Call Manager CSV integration files define three types of records

- **File Information Record**: The File Information Record denotes the Source of the data and the Version of the file. Inclusion of this record in the CSV file is optional. When it is included, the File Information Record must be the first record in the file.
  - — ***Source:*** This field is associated with all file records in Call Manager and corresponds to the ***Data Source*** column in the Directory Viewer. Typically, this value is set to the original source of the file contents.

    When this field is not included, Call Manager uses the CSV or XML file name as the ***Data Source*** contacts imported into the Directory Viewer.
  - — ***Version:*** This field displays the version of the contact information. When included, this field must be set to 1.0.

  Source and Version variable declarations must conform to the following:

  - — Syntax for the Source variable is `Source=`*`sourcetext`*.
  - — Syntax for the Version variable is `Version=`*`versionname`*.
  - — The Source and Version variables are optional.

    Example 1: "Source=Lotus","Version=1.0"
    Example 2: Source=Lotus, Version=1.0
- **Contact Header Record**: The Contact Header Record is mandatory and lists the names of the heading files in the Viewer Directory. The Contact Header Record is located immediately after the File Information Record. If the file does not contain a File Information Record, the Contact Header Record is the first record in the file.

  Although field names correspond to Directory Viewer heading names, the field names are not always identical to the heading.

  The following is a list of valid field names for CSV import files:

  - — ***Contact ID***: This field uniquely identifies the contact record within the file. The Contact ID is a string with a maximum of 126 characters. Call Manager does not display this field. All contact records require a Contact ID. If multiple contact record contain identical Contact IDs, the last such contact is the list is imported into Call Manager and all other contacts with the same ID are ignored.

    Call Manager does not display the contents of this field.
  - — ***First name***: Directory Viewer displays contents under the First Name column.
  - — ***Middle name***: Directory Viewer displays contents under the Middle Name column.
  - — ***Last name***: Directory Viewer displays contents under the Last Name column.
  - — ***Company***: Directory Viewer displays contents under the Company column.
  - — **Department**: Directory Viewer displays contents under the Department column.
  - — ***Business Phone***: Directory Viewer displays contents under the Business column.

  - — ***Business Phone 2***: Directory Viewer displays contents under the Business 2 column.
  - — ***Home Phone***: Directory Viewer displays contents under the Home column.
  - — ***Home Phone 2***: Directory Viewer displays contents under the Home 2 column.
  - — ***Mobile Phone***: Directory Viewer displays contents under the Mobile column.
  - — ***Pager***: Directory Viewer displays contents under the Pager column.
  - — ***Business Fax***: Directory Viewer displays contents under the Fax column.
  - — ***Email Address***: Directory Viewer displays contents under the Email column.
  - — ***Email2 Address***: Directory Viewer displays contents under the Email2 column.
  - — ***Email3 Address***: Directory Viewer displays contents under the Email3 column.
  - — ***IM Address***: Directory Viewer displays contents under the IM column.
  - — ***Categories***: Directory Viewer displays contents under the Categories column.

  Example 1: “Contact ID”,”First Name”,”Last Name”, “Business Phone”

- **Contact Record**: The file contains one record for each contact that is integrated into the Directory viewer. The order of data fields in each contact record must be identical to the fields in the Contact Header Record.

  Example 1: “ID_100”,”Johnny”,”Fracas”, “398-212-0012”
  Example 2: ID_100,Johnny,Fracas, 398-212-0012

CSV Examples

The following is an example of a CSV file where all fields are surrounded by double quotes:

“Source=Lotus”,”Version=1.0”

“Contact ID”, “First Name”, ”Middle Name”, “Last Name”, “Company”, “Department”, “Business Fax”, “Business Phone”, “Home Phone”, “Mobile Phone”, “Pager”, “Categories”, “Email Address”

“1234”,”Maude”,”June”,”Bigsby”,”Anycorp, Inc.”,””,,”(398) 777-8888”

“1235”,”David”,””””Doc””””,”Daniels”,”Anycorp, Inc.”,”Software Engineering”,”(398) 331-9999”,”(408) 331-3662”,”(650) 999-1212”,”(398) 218-9898”,”(398) 222-3434”,”New Customer”,”Ddaniels@anycorp.com”

The following is an example of a CSV file where only fields with commas and double quotes are surrounded by double quotes:

Source=Lotus,Version=1.0

Contact ID,First Name,Middle Name,Last Name,Company,Department,Business Fax,Business Phone,Home Phone,Mobile Phone,Pager,Categories,Email Address,IM Address

1234,Maude,June,Bigsby,”Anycorp, Inc.”,,,(398) 777-8888,,,,,,

1235,David,””””Doc””””,Daniels,”Anycorp, Inc.”,Software Engineering,(398) 331-9999,(398) 331-3652,(398) 929-1212,(398) 888-9898,(398) 222-3434, New Customer, Ddaniels@anycorp.com, Ddaniels5000@yahoo.com

8.4.2.2 XML Files

XML files contain a structured set of elements. The following sections describe required file components and XML elements recognized by Call Manager.

XML File Name

The file name must have the extension .xml.

Elements

The following elements are recognized by Call Manager Contact XML files.

Level 1 Elements: Each file contains one **Contacts** element.

- **contacts**: The Contacts element specifies the source name and version number and contains one Contact element for each contact in the file. Defines valid attributes
  - — ***valid attributes***: source, version

  Example: <contacts source = “File 1” version = “1.0”> </contacts>

Level 2 Elements: The ***Contacts*** element contains one ***Contact*** element for each user defined by the XML file. Each contact element contains Level 3 elements that define the field contents for the user. Each Contact element must contain one ContactID element and one other Level 3 element.

Level 3 Elements: Level 3 elements are contained with the Contact element and specify field contents for contacts imported to Call Manager. The following is a list of Level 3 elements.

- **contactID:** This field uniquely identifies the contact record within the file. The Contact ID is a string with a maximum of 126 characters. Call Manager does not display this field. All contact records require a Contact ID. If multiple contact record contain identical Contact IDs, the last such contact is the list is imported into Call Manager and all other contacts with the same ID are ignored.

  Example: <contactID>1234</contactID>
- **name:** This element specifies the contact’s name. Each contact element may contain only one name element.
  - — ***valid attributes***: first, middle, last

  Example: <name first=”Sarah” middle=”Jane” last=”Clauser”/>
- **company:** Each contact element may contain only one company element.
  - — ***valid attributes***: value

  Example: <company name=”Anycorp, Inc.”/>
- **department:** Each contact element may contain only one department element.
  - — ***valid attributes***: value

  Example: <department value=”Sales”/>
- **categories:** Each contact element may contain only one categories element.
  - — ***valid attributes***: value

  Example: <categories value=”Austin”/>
- **phone:** This element specifies the contact’s phone numbers. A contact element may contain multiple phone elements, subject to the following:

— ***valid attributes***: type, name, value

Type: The type attribute must be equal to one of the following: Business, Home, Mobile, Pager, and Fax.

- ▷ An element may contain 2 phone elements with name is equal to **Business**
- ▷ An element may contain 2 phone elements with name is equal to **Home**
- ▷ An element may contain 1 phone elements with name is equal to **Mobile**
- ▷ An element may contain 1 phone elements with name is equal to **Pager**
- ▷ An element may contain 1 phone elements with name is equal to **Fax**

Name: The name attribute specifies the label of the Call Manager Directory Viewer column heading. If a name value does correspond to a standard column heading label, Call Manager creates a new heading.

Value: The value attribute specifies the phone number that appears in the Directory Viewer data field.label of the Call Manager Directory Viewer column heading. If a name value does correspond to a standard column heading label, Call Manager creates a new heading.

Example 1: <phone type =”Business” name=”Business 2” value= “+1 (398) 244-2489”/>
Example 2: <phone type =”Pager” name=”Pager” value= “+1 (398) 298-231”/>

If multiple Phone Type elements have the same name attribute, Call Manager uses the first string and ignores all duplicate entries.

- **email**: This element specifies the contact’s email addresses. An contact element may contain a maximum of three email elements, subject to the following:

  — ***valid attributes***: name, value

  Name: The name attribute specifies the label of the Call Manager Directory Viewer column heading. If a name value does correspond to a standard column heading label, Call Manager creates a new heading.

  Value: The value attribute specifies the email address that appears in the Directory Viewer data field.label of the Call Manager Directory Viewer column heading. If a name value does correspond to a standard column heading label, Call Manager creates a new heading.

  Example 1: <email name=”email 2” value= “apierce@anycorp.net”/>
  Example 2: <email name=”email” value= “adam.pierce521@yahoo.net”/>

- **IM**: This element specifies the contact’s email addresses. An contact element may contain only one IM element.

  — ***valid attributes***: name, value

  Name: The name attribute specifies the label of the Call Manager Directory Viewer column heading. If a name value does correspond to a standard column heading label, Call Manager creates a new heading.

  Value: The value attribute specifies the IM address that appears in the Directory Viewer data field.label of the Call Manager Directory Viewer column heading. If a name value does correspond to a standard column heading label, Call Manager creates a new heading.

Example

The following is an example an Call Manager Contact Integration XML file:

```
<?xml version="1.0" encoding="utf-8"?>
<contacts source="Lotus" version="1.0">
  <contact>
```

```
    <name first="Sarah" middle="" last="Clauser"/>
    <company value="Anycorp, Inc."/>
    <department value="Finance"/>
    <contactID>1234</contactID>
    <phone type="Business" name="Business" value="+1 (398) 122-2558"/>
    <phone type="Business" name="Business 2" value="+1 (398) 122-2558"/>
    <email name="Email" value="Sclauser1021@anycorp.org"/>
    <email name="Email Address 2" value="sclauser@yahoo.com"/>
    <IM name="IM" value="sclauser1021@aol.com"/>
  </contact>
  <contact>
    <name first="Tammy" middle="" last="Masoon"/>
    <company value="Anycorp, Inc."/>
    <department value="Sales"/>
    <contactID>2234</contactID>
    <phone type="Home" name="Home" value="+1 (398) 962-2552"/>
    <phone type="Pager" name="Pager" value="+1 (398) 529-8670"/>
  </contact>
  <contact>
    <name first="Greg" middle="" last="Thilmonda"/>
    <company value="ShoreTel, Inc."/>
    <department value="Sales"/>
    <contactID>3234</contactID>
    <email name="Email" value="gthilmonda@anycorp.com"/>
  </contact>
  <contact>
    <name first="Patrick" last="Farrington"/>
    <contactID>4234</contactID>
    <phone type="Business" name="Business" value="+1 (398) 331-3642"/>
    <phone type="Mobile" name="Mobile" value="+1 (398) 666-5113"/>
    <phone type="Fax" name="Fax" value="+1 (398) 331-3642"/>
    <email name="Email" value="PFarrington@anycorp.com"/>
    <IM name="IM" value="PFarrington@aol.com"/>
  </contact>
</contacts>
```

8.5 Speed Dial

Speed Dial is a ShoreWare feature that dials a selected contact by pressing a single button on your ShorePhone. The Speed Dial viewer displays the your speed dial contacts and the number that initiates calls to those contacts. You can also initiate calls from the Speed Dial viewer.

8.5.1 Speed Dial Viewer

The Speed Dial viewer manages contacts that are associated with a speed dial digit. In addition to initiating voice calls, you can add, remove, and edit speed dial contacts from this panel.

Figure 8-12 displays the Speed Dial viewer in a Satellite window. You can also view the Speed Dial viewer in the Content Area of the Main Window.

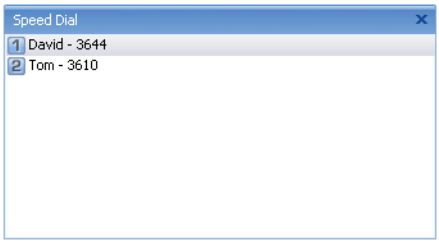


Figure 8-12 Speed Dial viewer in a Satellite window

To open the Speed Dial Viewer, perform one of the following:

- Click the Application Button and select ***Windows -> Speed Dial***
- Select ***Windows -> Speed Dial*** from the Main Menu
- Select ***Windows -> Speed Dial*** from the Assignment bar
- Right click the ShoreTel icon in the system tray and select ***Windows -> Speed Dial***
- Press Ctrl+Shift+P

The Speed Dial viewer opens in the Main window content area or in a Satellite window.

The Speed Dial viewer consists of a Contact Table that lists your speed dial contacts. The first ten contacts are associated with a numeric key. To initiate a call to the contact,

- Pressing the specified ShorePhone key.
- Double click the entry on the Speed Dial viewer
- Right click an entry and select Dial.

8.5.2 Managing Speed Dial Entries

The menu bar provides buttons for adding and deleting Speed Dial entries. You can also edit labels of your Speed Dial entries.

To add a Speed Dial Number:

Step 1 Right click the entry and select ***Add Entry***.

Call Manager responds by displaying the ***Add Speed Label*** panel.

Step 2 Enter the name, IM, email address, or phone number of the desired contact in the Number data entry field.

As you fill the data entry field, a drop down menu displays the list of directory entries filtered by the text in the field.

Step 3 Select the desired contact in the drop down list.

Step 4 Enter an identifier for the contact in the Label field.

Step 5 Press the OK button to save the contact into the Speed Dial list and assign the next available Speed Dial digit to the contact.

To edit a Speed Dial label:

Step 1 Right click the entry and select ***Edit Label***.

Call Manager responds by displaying the ***Edit Speed Label*** panel.

Step 2 Enter the new Label contents into the data entry field.

Step 3 Press the OK button to save the label changes.

To delete a Speed Dial entry, right click the entry and select Delete.

To rearrange Speed Dial contacts:

Step 1 Click and hold the entry to be moved in the ***Speed Dial*** list.

Step 2 Drag the entry to the desired position within the list.

Step 3 Release the mouse button.

CHAPTER 9

Managing Voice Mail

9.1 Introduction

Call Manager provides access to voice messages received by your user and workgroup extensions. Voice message actions that you can perform through Call Manager includes:

- View a list of your messages
- Listen to your messages
- Compose and send new messages
- Reply to a message
- Specify the device for listening and composing messages
- Manage your voice message files
- Export messages for use by other applications
- Call back the message sender
- Forward a message
- Create personal distribution lists
- Save and delete messages
- Export messages

ShoreWare provides two methods for handling voice mail.

- Voice Mail Viewer is a Call Manager component that is accessed from the Main Window.
- Outlook integration provides an alternative method for managing voice messages from Outlook.

This chapter describes the Call Manager Voice Mail Viewer and references this viewer for all process and component descriptions. Refer to Section 12.3 on page 146 for information on using Microsoft Outlook for managing voice mail.

9.2 Mailboxes and Messages

ShoreWare stores voice messages in mailboxes that are accessible to system users. This section describes the properties of ShoreWare Mailboxes and Voice Messages

9.2.1 Mailboxes

ShoreWare defines one mailbox for each user extension and each workgroup extension. User extension mailboxes are accessible only to the user assigned to the extension. Workgroup mailboxes are available through Workgroup Agent, Workgroup Supervisor, and Operator Call Manager to all users assigned to the workgroup.

Each mailbox contains three folders: an ***Inbox*** folder, a ***Saved*** folder, and a ***Deleted*** folder. When you access Voice Mail through Outlook, the Saved folder is named Archive Folders.

- **Inbox Folder:** The Inbox folder receives an extension's inbound voice messages. Messages remain in this folder until moved to the Saved or Delete folder.
- **Saved Folder:** The Saved folder is a repository for messages that were previously received but are not yet ready for deletion. Placing messages in the Saved folder.
- **Deleted Folder:** Messages moved to the Deleted folder remain there until 2:00 a.m (server) time, when ShoreWare removes messages that are at least 6 hours old. Voice mail messages less than six hours old remain in the Deleted folder until 2:00 a.m. the next day. Messages moved to the Deleted Folder and then subsequently deleted are removed from the system and cannot be recovered.

  You can restore messages in the Deleted Folder by moving them to the Inbox or Saved folders, after which they are safe from daily maintenance deletion.

9.2.2 Voice Messages

This section describes the properties and content of ShoreWare voice messages.

9.2.2.1 Properties

ShoreWare defines two properties that categorize voice messages. Message status indicates if a message has been heard. The Urgency Mark assigns an importance signal to a message.

- **Message Status:** ShoreWare defines two message status levels – heard and unheard. The message status is adjusted as follows:
  - The system changes the status of a message to ***Heard*** when you listen to the message.
  - You can manually change the message status by right clicking the message and selecting ***Mark as Heard*** or ***Mark as Unheard***.

  ShoreWare uses Message status to select messages for deletion through the auto-deletion operation, as described in Section 9.2.2.3.
- **Urgency Mark:** The Urgency Mark is assigned to a message by the sender and indicates high importance or time relevance of the message. The Urgency Mark setting is not editable.

9.2.2.2 Content

Message content consists of the message recording as composed by the sender. The content is not editable. You can export the message content to a wav file, as described in Section 9.3.2.4.

Message timestamps displayed by Call Manager are based on the computer's time zone setting.

9.2.2.3 Message Deletion

Messages are removed from the system either through user selection or through auto-deletion operations defined by the system administrator.

- **User deletion:** Users specify messages to be deleted by moving them to the Deleted folder. The system then deletes messages that are older than six hours during the Voice Mail Maintenance operations performed by ShoreWare at 2:00 am each day.
- **Auto deletion:** ShoreWare provides voice message auto-deletion for administrators to conserve system storage resources. Messages are stored for a period specified by an administrator, then permanently removed from the system. Users receive a

message informing them of the imminent auto deletion of their message. The range of valid retention periods is between 30 and 2000 days.

ShoreWare defines retention periods for two classes of messages:

— ***Class 1:*** Messages in the Saved folder OR Messages marked as Unheard.
— ***Class 2:*** Messages in the Inbox folder AND Messages marked as Heard.

Retention periods for the message classes are defined independently of each other. Administrators can also disable auto deletion. Refer to your administrator for more information and to determine the retention period for your messages.

9.3 Voice Mail Viewer

The Voice Mail viewer is a graphical user interface for accessing your voice messages. You use Voice Mail viewer tools to manage message files, listen and respond to messages, compose new outbound messages, and broadcast messages to groups through Distribution Lists.

To open the Voice Mail viewer, perform one of the following:

- Click the Application Button and select ***Windows -> Voice Mail***
- Select ***Windows -> Voice Mail*** from the Main Menu
- ShoreTel icon in the System tray and select ***Windows -> Voice Mail***
- Press Ctrl+Shift+V

The Voice Mail viewer opens in the Main window content area or in a Satellite window.

9.3.1 Viewer Components

The Voice Mail viewer displays the messages in your mail box, as shown in Figure 9-1. Each row corresponds to one message. Each column lists one message property.

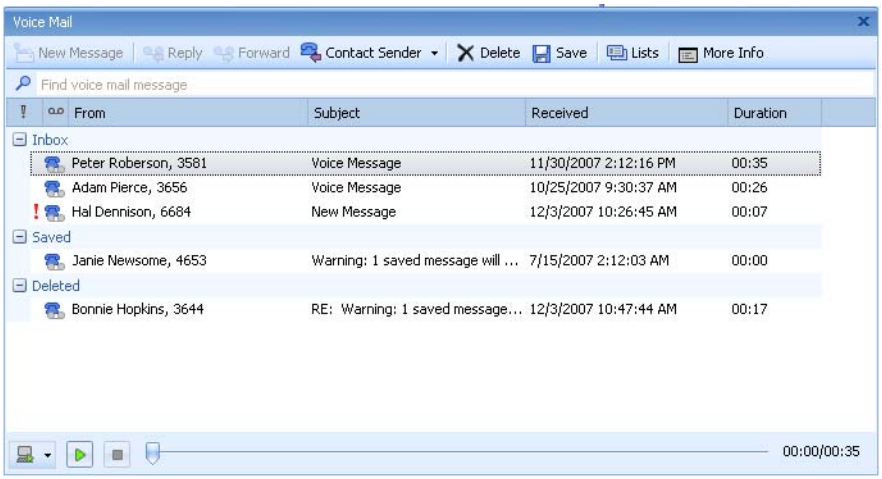


Figure 9-1 Voice Mail Viewer

Voice Main Viewer components include:

- **Action bar**: The action bar contains buttons that trigger message actions, initiate viewer functions, or display message properties. Action bar buttons include:

  — ***New Message:*** Press this button to record and send a voice message.

- — ***Reply:*** Press this button to record and send a response to the highlighted message.
- — ***Forward:*** Press this button to send the highlighted message to other recipients.
- — ***Contact Sender:*** Select this button to initiate a call, IM, or email to the sender of the highlighted message.
- — ***Delete:*** Press this button to move the highlighted message to the Deleted folder.
- — ***Save:*** Press this button to move the highlighted message to the Saved folder.
- — ***Lists:*** Press this button to open the Distribution Lists dialog box.
- — ***More Info:*** Press this button to display a panel that lists properties about the highlighted message.

- **Filter bar:** The Voice Mail viewer displays only entries whose sender name or number is filtered by the contents of this data entry field.

- **Column Headings:** Column headings indicate the data field name for the address entries. Available column headings include:

  - — ***Urgent Mark:*** This column is denoted by an exclamation point (!) and indicates the message's urgency status. You cannot remove this column from the table.
  - — ***Message:*** This column is denoted by a cassette icon and indicates the message type. You cannot remove this column from the table.
  - — ***From:*** This column lists the sender of the message.
  - — ***Subject:*** This column lists the message subject. The subject is initially specified by the sender and can be edited from the context menu.
  - — ***Received:*** This column lists the day and time that you received the message.
  - — ***Duration:*** This column lists the length of the message, in seconds.
  - — ***GUID:*** This column lists the internal message identifier.

    Call Manager timestamps are based on the timezone setting of the user's computer.

  Viewer operations that manipulate Voice Mail viewer heading bar contents include:

  - — ***To add a column to the table,*** right click in the Message Contents region and select **Choose Columns**. Then drag the column to be added to the desired location in the Column Heading.
  - — ***To sort the contents,*** click in the heading of the desired sort column. Clicking repetitively in the field reverses the order of the sort.
  - — ***To move a column to a different heading location,*** click and hold on the column to be moved, then drag the column to the desired location.
  - — ***To remove a column from the table,*** click and hold on the column to be removed then drag the column from the table until a large X appears on the column.

- **Mailbox Contents:** The table below the column headings displays your voice messages.

  The Voice Mail viewer displays components in a hierarchal file structure

  - — The first hierarchical layer specifies the ***mailboxes***, which are identified by the extension receiving the messages.
  - — The second hierarchical layer specifies the ***mailbox folders***, including the Inbox, Saved, and Deleted folders.
  - — The third hierarchical layer lists the ***messages*** that each mailbox folder contains.

- **Playback bar:** The playback bar is located at the bottom of the Voice Mail viewer and controls the audio playback of the highlighted message. Playback bar buttons, listed from left to right, include:

— ***Playback device:*** This icon controls the device through which you listen to messages. You can select your PC speaker or assigned phone through this button.
— ***Play/Pause button:*** Press this button to control the playback of the highlighted message.
  - When this button displays a green arrow icon, pressing the button initiates or continues audio playback of the message.
  - When this button displays a pause symbol (two parallel bars), pressing the button pauses the audio playback. Pressing this button again resumes the playback from the point it was paused.

— ***Stop button:*** Press this button to discontinue playback of the highlighted message and reset the playback cursor to the start of the message.
— ***Cursor:*** This indicator specifies the current message point. During message playback, this point indicates the part of the message that is being played. During message pause or stop, this point indicates the part of the message that call manager plays when you press the play button. Click, hold, and move the cursor to adjust the current message point.
— ***Duration:*** The time indicators indicate the current message point, relative to the beginning of the message, and the length of the message.

9.3.2 Managing Viewer Contents

The following sections describe the file manipulation operations that control the contents of the Voice Mail Viewer.

9.3.2.1 Saving a Voice Message

Saving a Voice Mail Messages moves a message from the Inbox or Deleted folder to the Saved folder.

To save the highlighted message, perform one of the following:

- Press the Save button in the Action bar.
- Right click the message and select *Move to Saved folder.*

  The message is moved to the ***Saved*** folder.

9.3.2.2 Deleting a Voice Message

Messages moved to the Deleted folder remain there until 2:00 a.m (server) time, when ShoreWare removes messages that are at least 6 hours old. Voice mail messages less than six hours old remain in the Deleted folder until 2:00 a.m. the next day.

To move the highlighted message to the deleted folder, perform one of the following:

- Press the Delete button in the Action bar.
- Right click the message and select *Move to Deleted Icons folder.*

  The message is moved to the ***Deleted*** folder.

9.3.2.3 Recovering a Voice Mail Message

You can recover messages in the Deleted folder until ShoreWare removes them from the server during the 2:00 am voice mail maintenance cycle. To recover a message in the Deleted folder, move it to the Inbox or Saved folders.

To recover the highlighted message from the Deleted folder, perform one of the following:

- Press the Save button in the Action bar.
- Right click the message and select *Move to Inbox folder* or *Move to Saved folder.*

The message is moved to the selected folder.

9.3.2.4 Exporting a Voice Mail Message

You can export a voice mail message to a .wav file for use by other applications.

To export the highlighted message to a wav file:

Step 1 Right click the message and select ***Export to. wav File.***

Call Manager opens a **Save As** windows folder.

Step 2 Select the desired file location for the .wav file and, if desired, modify the name listed in the file name field.

Step 3 Click the **Save** button.

9.4 Managing Voice Messages

9.4.1 Listening to a Message

You can listen to your messages using either your computer's speakers or your telephone. When listening to messages through your speakers, playback begins when you press the Play button. When listening to messages through your telephone, pressing the Play button triggers your phone to ring; message playback begins after you lift the receiver.

To listen to the highlighted message, perform one of the following:

- Double click the message.
- Click the play button in the Playback bar at the bottom of the Voice Mail viewer.

9.4.2 Replying to a Voice Message

You can reply to voice messages sent by other ShoreWare users through the Voice Mail viewer. You can only send Voice Messages to other users on your ShoreWare system.

To reply to the highlighted voice message:

Step 1 Perform one of the following:

- Click the **Reply** button on the Action bar.
- Right click the message and select **Reply** or **Reply to All** on the context menu.

Call Manager opens the Voice Message Recorder panel, as shown in Figure 9-2.

Step 2 Click the **To** button to select the Message Recipients.

Call Manager opens the Add/Remove Members panel for selecting recipients.

Step 3 Enter the Message subject in the ***Subject*** data entry field.

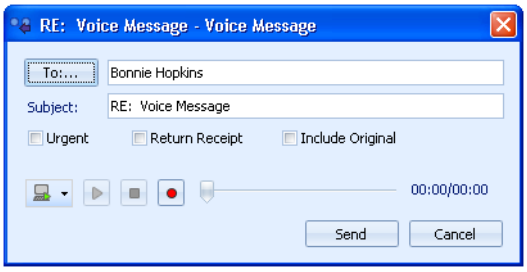


Figure 9-2 Voice Message Recorder panel

Step 4 Press the ***Device*** button in the bottom left corner to specify the recording device.

Step 5 Press the ***Record*** button, then speak into the recording device. Press the ***Stop*** button to end the recording.

Step 6 Click the ***Send*** button to send the message to the Recipients.

9.4.3 Forwarding a Voice Message

Forwarding a Voice Message sends that message to another system user. You can only forward messages to other users on your ShoreWare system.

To forward the highlighted voice message:

Step 1 Perform one of the following:

- Click the **Forward** button on the Action bar.
- Right click the message and select **Forward** on the context menu.

Call Manager opens the Voice Message Recorder panel, as shown in Figure 9-2.

Step 2 Click the **To** button to select the Message Recipients.

Call Manager opens the Add/Remove Members panel, as shown in Figure 9-3.

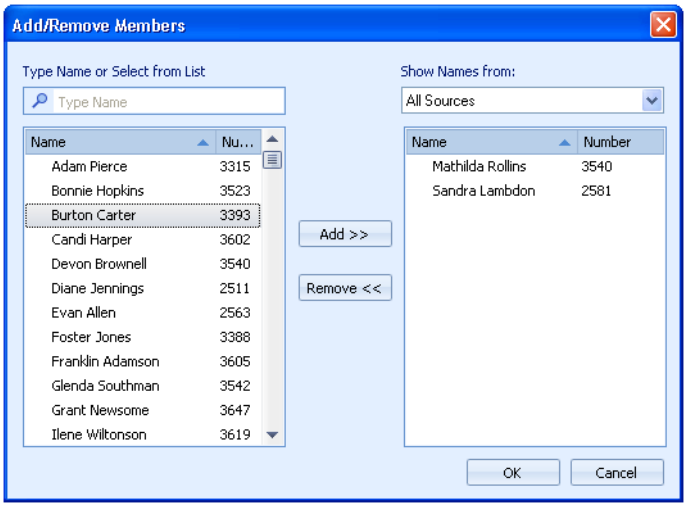


Figure 9-3 Add/Remove Members panel

Step 3 Select the recipients of the message on the left table by highlighting the desired contacts, then pressing the Add button between the tables.

Step 4 Press the OK button after selecting all desired recipients.

The **Add/Remove Members** panel closes and control returns to the Voice Message Recorder panel. You can add an introductory statement before sending the message.

Step 5 Click the **Send** button on the Voice Message Recorder panel to send the message to the Recipients.

9.4.4 Calling the Sender

If Caller ID is available for a voice mail message, you can call the sender.

To call the sender of the highlighted message, perform one of the following:

- Press the Contact Sender button on the Action bar.
- Right click on the contact and select the desired contact method at the top of the context menu.

9.4.5 Editing the Subject Header

You can edit the subject header of your voice messages.

To edit the subject header of the highlighted message:

Step 1 Right click the message and select **Edit Subject** from the context menu.

Step 2 Enter the desired text in the Edit Subject panel.

Step 3 Click **OK**.

9.4.6 Recording and Sending a New Voice Message

You can record voice messages using your telephone or a microphone. You can only send voice messages to other users on your ShoreWare system.

To record and send a new voice message:

Step 1 Click the **New Message** button on the Action bar.

Call Manager opens the Voice Message Recorder panel.

Step 2 Click the **To** button to select the Message Recipients.

Call Manager opens the Add/Remove Members panel

Step 3 Type the subject in the **Subject** box.

Step 4 Press the **Device** button in the bottom left corner to specify the recording device.

Step 5 Press the **Record** button, then speak into the recording device. Press the ***Stop*** button to end the recording.

Step 6 Click the **Send** button to send the messages to the Recipients.

9.4.7 Viewing Voice Message Information

The voice mail properties dialog box displays properties of a voice message, including the sender, subject, folder location, date of receipt, duration, urgency status, and forwarding history.

To view information about a voice message, perform one of the following:

- Right click the message and select More Info
- Select a message and select More Info on the Action bar

9.5 Voice Mail Notification

9.5.1 Introduction

Voice Mail Notification is a ShoreWare feature that sends email or initiates voice calls to designated contact points when you receive a voice message. The purpose of Voice Mail Notification is to inform you of inbound voice messages when Call Manager or other ShoreWare utilities are not immediately accessible.

Call Manager provides two Notification levels:

- **Personal Notification:** Personal Notification sends a single email message to a specified address.
- **Notification Escalation:** Notification Escalation initiates a series of contact attempts to various email addresses or phone numbers. Notification Escalation is typically enabled during periods when you may receive messages that require an immediate response.

Voice Mail Notification is configured on the Voice Mail and Escalation panels of the Options and Preferences window.

9.5.2 Personal Notification

When Personal Notification is enabled, Call Manager sends a message to a specified email address when your user account receives a voice message. You can program Call Manager to send only the notification message or to attach the inbound voice message to the notification message.

To setup personal notification for your extension:

Step 1 Open the Options and Preferences window by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the Call Manager icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select **Voice Mail** from the menu on the left side of the panel.

Step 3 Enable Notification and specify the content of notification messages from the **Escalation Delivery Options** drop down menu.

- Select ***Disabled*** to prevent Call Manager from sending you notification messages.
- Select one of the other options to enable personal notification.
  - — Select ***Email Wave Mail*** to attach the voice message to your notification messages.
  - — Select ***Email Notification*** to send notification messages without attaching the voice message.

Step 4 Specify the messages that trigger a personal notification from the **Escalation Notification Options** radio buttons:

- Select ***Escalate for each New Message*** to send a notification message immediately when you receive a voice message.
- Select ***Escalate for First Unheard Message*** to delay the notification message for an inbound voice message until after all of your previously received voice messages are marked *Heard*.

Step 5 Specify the email address to where Call Manager sends your messages in the ***Deliver to Email Address*** data entry field.

The **Mark delivered voice mail as Heard** option disables Notification Escalation, as described in Section 9.5.3.

9.5.3 Notification Escalation

Notification Escalation initiates a series of contact attempts to various email addresses or phone numbers when you do not respond to an inbound voice message. Notification Escalation is typically enabled when you may receive messages requiring an immediate response.

The following sections describe the Call Manager Escalation process and the tasks required to configure and enable Escalation.

9.5.3.1 Escalation Components

The Escalation process defines the following software components:

- **Step:** A step consists of at least one contact address and a timeout. Contact addresses can be phone numbers or email addresses. When the step is active, ShoreWare delivers a notification message to each listed contact address. The timeout specifies the period Call Manager waits before the next contact attempt. Section A.2.8.1 on page 160 describes the **Escalation Profile** panel that defines all step for an escalation profile.
- **Profile:** A profile consists of a list of steps that define a notification program and a counter that specifies the maximum number of notification attempts. Each profile may have a maximum of ten steps. A user may define a up to nine profiles to specify multiple custom notification procedures for handling various situations. Section A.2.8 on page 159 describes the **Options and Preferences: Escalation** panel that lists all profiles defined for your extension.

9.5.3.2 Escalation Structure

Escalation components interact with other Call Manager components as follows:

- **Invoking Profiles:** Each Call Handling Mode provides a Voice Mail Escalation Profile option that specifies one of your configured Notification profiles. When that Call Handling Mode is active and Escalation is triggered, the profile specified by

this option defines the notification process until Call Manager receives a response. Section A.2.4 on page 154 describes the Call Handling Mode Configuration panels that reference escalation profiles.

- **Activating Escalation:** Escalation is activated by disabling ***Mark delivered voice mail as Heard*** on **Options and Preferences: Voice Mail** panel. Section A.2.7 on page 158 describes the **Options and Preferences: Voice Mail** panel.

9.5.3.3 Escalation Process

The Escalation process consists of a trigger condition, a Notification Cycle, and a Terminating Condition.

Trigger Condition: The trigger conditions specify the event required to initiate an Escalation process. The following are the conditions required to initiate an escalation:

1. The active Call Handling Mode specifies a valid Escalation profile.
2. The Deliver Voice Mail as Heard on the Options and Preferences: Voice Mail panel is not selected.
3. The user receives a call that generates a voice mail message.

Notification Cycle: After detecting the Trigger Condition, ShoreWare performs the following steps until the Terminating Condition is satisfied:

1. Call Manager sends a voice mail or a phone call to the address listed in the first configured step in the profile.
2. Call Manager waits for the period specified by the Timeout field.
3. Call Manager repeats 1 and 2 for each configured step in the profile. Executing 1 and 2 for all configured steps is defined as a notification cycle.

Terminating Condition: Call Manager continues the Notification cycle until one of the terminating conditions is satisfied:

- The message that triggered the escalation is marked as **Heard**.
- Call Manager has performed the Notification Cycle the maximum number of times. The maximum is defined as ***Repeat Count*** + 1, where ***Repeat Count*** is specified in the **Escalation Profile** panel that configures the Escalation profile.

9.5.3.4 Configuring Escalation

The following steps are required to configure and enable Escalation Notification:

Step 1 Define Escalation profiles.

The Escalation panel lists the Escalation Profiles configured for your extension. Section A.2.8 describes the Escalation panel.

Step 2 Assign Escalation profiles to Call Handling Modes.

Call Handling Modes are configured by opening the desired mode in the Options and Preferences panel. The **Voice mail escalation profile** drop down menu assigns a profile to the Call Handling Mode.

If you set **Escalation Profile** to ***None*** for a call handling mode, Escalation is disabled for that mode.

Step 3 Enable Escalation from the **Options and Preferences: Voice Mail** panel by clearing the ***Mark delivered voice mail as Heard*** parameter. Section A.2.7 on page 158 describes the **Options and Preferences: Voice Mail** panel.

9.6 Distribution Lists

ShoreWare defines Distribution lists for sending voice messages to a group of system users. The following sections describe ShoreWare distribution lists that you can access through Call Manager.

9.6.1 Distribution List Types

ShoreWare defines three types of distribution lists:

- **Broadcast List:** ShoreWare defines one Broadcast List, which includes all systems defined on the system. ShoreWare assigns an extension number to the Broadcast List.

  You must have authorization, as configured by the System Administrator, to send messages through the Broadcast Distribution List. Only the system administrator can create, edit, or delete the Broadcast List.

- **System Lists:** System Lists are defined for the entire ShoreWare system. The system administrator creates and modifies system lists, which are then accessed by users through an extension number assigned to the list.

  You must have authorization, as configured by the System Administrator, to send messages through System Distribution Lists. You cannot create, edit, or delete System Distribution Lists through Call Manager.

- **User Lists:** User Lists are created by individual ShoreWare users for use by that user. User Lists can be modified and accessed only by the creator of the list. Index numbers, instead of extensions, are associated with each list.

9.6.2 Distribution Lists panel

The Distribution Lists panel, as shown in Figure 9-4, displays the accessible distribution lists and provides tools for managing your lists. To access the Distribution Lists panel, perform one of the following:

- Click the **Lists** button on the Action bar.
- Right click in the contents area and select **Distribution Lists** on the context menu.

Distribution Lists panel components include:

- **List roster:** The List Roster is located on the left side of the panel and displays all available distribution lists.
  - — User Lists are denoted with a leading # sign in the number field. In Figure 9-4, List_1 is a user list.
  - — The Broadcast List is denoted by the name ***Broadcast***.
  - — System Lists are associated with an extension in the number field.

- **New button:** Pressing the **New** button opens the Distribution List Details panel. You create new lists and modify existing lists from this panel.

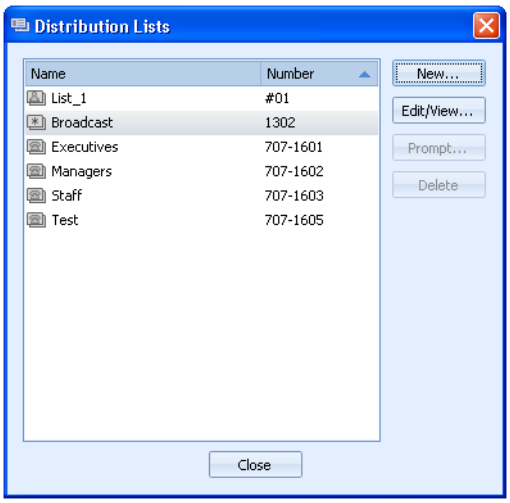


Figure 9-4 Distribution Lists panel

- **Edit/View button**: Pressing the **Edit/View** button opens the Distribution List Details panel for the highlighted list. The available components depend on the List for which the panel was opened.

  — The panel opens a viewing panel for System and Broadcast list, as shown in Figure 9-5.

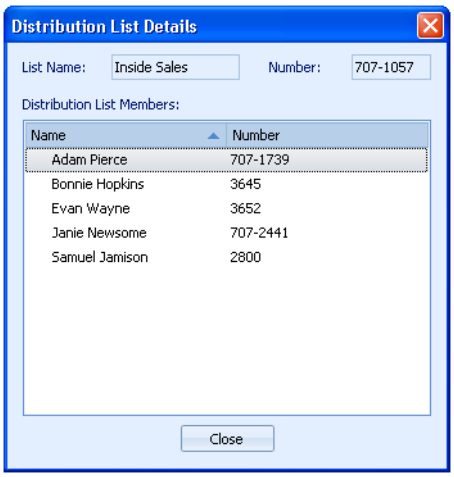


Figure 9-5 Distribution List Details – Viewing Mode

  — The panel opens an edit panel for user lists. Section 9.6.3 describes the use of this panel for modifying and creating Distribution Lists.

- **Prompt button**: Pressing the Prompt button opens a recorder bar for the highlighted list in the List roster. The prompt announces the name of the distribution list when other users send a message to list members.

  The **Prompt** button is disabled for System lists and the Broadcast list.

- **Delete button**: Pressing the Delete button removes the highlighted list from the List roster. The Delete button is disabled for System lists and the Broadcast list.

9.6.3 Managing User Distribution Lists

9.6.3.1 Creating Distribution Lists

The title assigned to a distribution list becomes the contact name for that list. You type or select that name when sending a voice message to the list members using the ShoreTel Voice Mail Viewer or Microsoft Outlook. The assigned number becomes the telephone number used when using the distribution list to deliver voice messages.

To create a distribution list

Step 1 Open the Distribution Lists panel by performing one of the following:

- Click the **Lists** button on the Action bar.
- Right click in the contents area and select ***Distribution Lists***.

Step 2 Click the **New** button.

Call Manager displays the **Distribution Lists Details** panel, in edit mode, as shown in Figure 9-6.

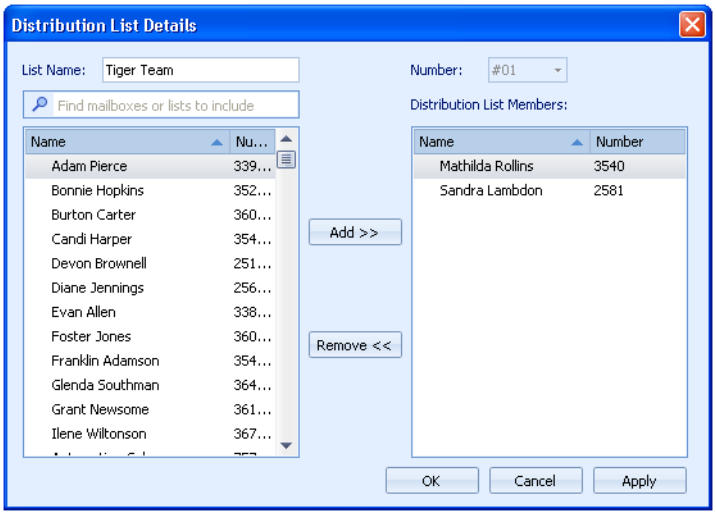


Figure 9-6 Distribution List Details – Edit Mode

Step 3 Type the title of the new distribution list in the **List Name** field

Step 4 Select an identification number through the **Number** box drop down list.

Step 5 Select a contact in the left list and press the Add button to include the member in the user list. Repeat until all desired members are included in the list.

Step 6 Click the **OK** button to save the list and return to the Distribution Lists panel.

9.6.3.2 Recording a Distribution List Prompt

The Distribution List prompt announces the name of the distribution list when other users send a message to the list members.

To record a prompt for a distribution list:

Step 1 Open the Distribution Lists panel by performing one of the following:

- Click the **Lists** button on the Action bar.
- Right click in the contents area and select **Distribution Lists**.

Step 2 Select a List on the panel.

Step 3 Click the **Prompt** button.

Call Manager displays the Prompt Recorder. The controls on the Prompt Recorder are similar to those on the Playback bar located on the bottom of the Voice Mail Viewer, as described in Section 9.3.1 on page 109.

The **Prompt** button is unavailable for the Broadcast List and all System Lists.

Step 4 Press the **Device** button on the left side to select the recording device.

Step 5 Press the **Record** button, then speak into the recording device. Press the ***Stop*** button to end the recording.

Step 6 Press the **OK** button to save the prompt and return to the **Distribution Lists** panel.

9.6.3.3 Editing Distribution Lists

You can change the members on existing user lists.

To add or remove names from a distribution list:

Step 1 Open the Distribution Lists panel by performing one of the following:

- Click the **Lists** button on the Action bar.
- Right click in the contents area and select **Distribution Lists**.

Step 2 Select a distribution list from the List roster on the left side of the panel.

Step 3 Click the **Edit/View** button.

If the highlighted item is a User List, Call Manager displays the Distribution Lists Details panel, in edit mode, as shown in Figure 9-6. If the highlighted item is the Directory List or a system list, Call Manager displays the Distribution Lists Details panel in view mode, as shown in Figure 9-5.

Step 4 Edit the list by adding or removing users.

- To add users, type a name or select a name from the available list, and click the **Add** button
- To remove users, select a name from the ***Distribution Lists Members*** area, and click the **Remove** button.

Step 5 Repeat this process until the list contains the desired users and contacts.

Step 6 Click the **OK** button to save the list and return to the **Distribution Lists** panel.

9.6.3.4 Deleting Distribution Lists

You can only delete User Distribution Lists. You cannot delete System distribution lists or the Broadcast list.

To delete a distribution list

Step 1 Open the Distribution List panel by performing one of the following:

- Click the **Lists** button on the Action bar.
- Right click in the contents area and select **Distribution Lists**.

Step 2 Select the list to be removed from the roster on the left side of the panel.

Step 3 Click the **Delete** button.

The **Delete** button is not available if the selected list is a System list or the Broadcast list.

Step 4 Click the **Close** button to close the Distribution Lists panel.

9.6.4 Using a Distribution List

Distribution lists are available as contacts when selecting the recipients of a voice message from the Add/Remove Members panel. In Figure 9-7, the icon to the left of the Broadcast and Executive entities indicate that they are distribution lists.

To select a distribution list, perform one of the following:

- Enter the extension of a System List or the Broadcast list in the data entry field in the top left corner of the panel
- Enter the name of the Distribution List in the data entry field in the top left corner of the panel
- Scroll in the table on the left side of the panel and click on the name of the desired Distribution list.

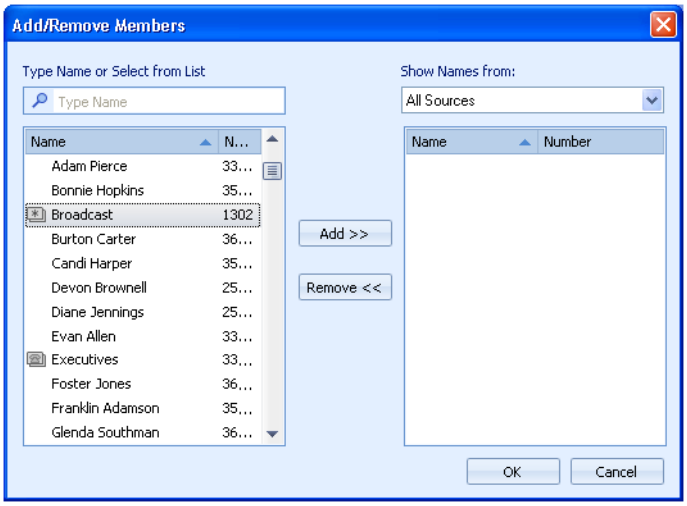


Figure 9-7 Add/Remove Members panel

After selecting a list, pressing the **Add** button in the center of the panel adds the list to the roster of message recipients.

Section 9.4.6 on page 114 describes the methods of sending voice messages.

9.7 Configuring Voice Mail

9.7.1 Options and Preferences

The **Options and Preference: Voice Mail** panel specifies the default interface for listening and recording voice messages, records your spoken name that the system plays to callers routed to your mailbox, and configures your voice mail password. Section A.2.7 on page 158 describes the **Options and Preferences: Voice Mail** panel.

9.7.2 Using System IDs to Address AMIS Voice Mail

Your system administrator can configure your voice mail system to send messages to remote systems either using the same extension numbers you use to dial the remote users, or by assigning a unique system identification to each system in the network. Your administrator should provide information on the way your voice mail system is configured.

To send voice mail using system IDs to recipients on AMIS systems, enter the system ID followed by the mailbox number (extension) of the recipient on the AMIS system.

Example: If the system ID is **8331** and the mailbox number is **1234**, enter **83311234** to address the voice mail. Your System Administrator can tell you the system IDs you need to address AMIS voice mail for each remote site.

If your system administrator configured your voice mail system to use the extension numbers of remote users, voice mail messages are referenced by their remote extension number.

If ShoreTel cannot deliver a voice message after three attempts, it stops trying and returns the message to you. If your voice mailbox is full, you will not receive notification about the messages that were not delivered.

CHAPTER 10

Workgroups and Operators

10.1 Introduction

Workgroups is an entry level contact center application for small, informal Automatic Call Distribution (ACD) groups that is integrated into ShoreWare. Workgroups support basic call routing, agent management, reporting, and agent activity functions.

Classic phone operators provide assistance to callers and manage PBX switchboards. Although many operator functions can be automated, many systems or situations require a live person to handle specific issues.

Call Manager supports Workgroups and Operators through three Call Manager types. This chapter describes functions and components provided by these client types.

10.2 Client Types

Call Manager provides three client types that provide capabilities required by users that do have workgroup or operator responsibilities: Workgroup Agent, Workgroup Supervisor, and Operator.

10.2.1 Workgroup Agent

Workgroup Agent Call Manager is assigned to workgroup members that have basic call handling responsibilities. Workgroup Agent Call Manager supports the following features:

- All functions available through Professional Call Manager
- Enhanced Contacts Viewer capabilities, including drag-and-drop call transfer
- Workgroup access utilities
- Workgroup Queue Monitor
- Workgroup voice mailbox

10.2.2 Workgroup Supervisor

Workgroup Supervisor Call Manager is assigned to users that are members of a workgroup and have management responsibilities over the members and function of the group. Workgroup Supervisor Call Manager supports the following features:

- All functions available through Workgroup Agent Call Manager.
- Workgroup Agent Monitor
- Enhanced Agent Monitor capabilities
- Supervisory specific functions, including editing agent access settings and establishing Workgroup activity thresholds.

10.2.3 Operator

Operator Call Manager is assigned to users that are required to provide assistance to system callers or have call routing responsibilities. ShoreWare Operator Call Manager supports the following features:

- All functions available through Workgroup Supervisor Call Manager.
- Enhanced Contact viewer capabilities, including call and agent management functions
- Bridged Call Appearance Monitor.

10.3 Workgroup Status

10.3.1 Logging into and out of a Workgroup

Workgroup members receive calls to the workgroup extension when they are available and are logged into the workgroup call. Call Manager displays workgroup status in the status bar. Users that belong to multiple workgroups can receive calls from all the workgroups to which they are members when their status is available. Each user has one workgroup status that applies to all their workgroups.

To log in to your workgroups, perform one of the following:

- Click the Application Button and select ***Workgroup -> Logged In.***
- Select ***Workgroup -> Logged In*** from the main menu.
- Click the Workgroup button on the Assignment Bar and select ***Logged In***.
- Right click the ShoreTel icon in the System Tray and select ***Workgroup -> Logged In.***
- Press Ctrl+Alt+I.

To log out of your workgroups, perform one of the following:

- Click the Application Button and select ***Workgroup -> Logged Out.***
- Select ***Workgroup -> Logged Out*** from the main menu.
- Click the Workgroup button on the Assignment Bar and select ***Logged Out***.
- Right click the ShoreTel icon in the System Tray and select ***Workgroup -> Logged Out.***
- Press Ctrl+Alt+O.

Your call control status appears in the Agent Monitor, which advise workgroup supervisors of your availability to accept workgroup calls. The workgroup supervisor can also log members in or out of the workgroup.

Depending on the workgroup's configuration, you may also be logged out automatically if you do not answer a workgroup call while logged in.

10.3.2 Call Wrap-Up

The Call Wrap-Up feature gives you time between calls to complete notes or finish updates to customer records. You are not available to accept calls from the queue when you are in Wrap-Up mode. After the Wrap-Up interval ends, you are automatically logged into the workgroup. The wrap up interval is defined for each workgroup and configured by the system administrator.

You can change your Call Wrap-Up status before the interval ends by logging in or out of the workgroup.

To manually enter wrap up mode, perform one of the following:

- Click the Application Button and select ***Workgroup -> Wrap-Up.***
- Select ***Workgroup -> Wrap-Up*** from the main menu.
- Click the Workgroup button on the Assignment Bar and select ***Wrap-Up***.
- Right click the ShoreTel icon in the System Tray and select ***Workgroup -> Wrap-Up.***
- Press Ctrl+Alt+W.

To manually exit wrap up mode, log into or out of your workgroups.

10.4 Viewer Descriptions

Workgroup Agent, Workgroup Supervisor, and Operator Call Managers provide viewers that are not available for Personal and Professional Call Managers. Additionally, viewers that are accessible to Personal and Professional Call Managers may offer enhanced functionality to support Operators and Workgroup Members.

The following sections describe Call Manager Viewers available to Workgroup and Operator Call Manager.

10.4.1 Queue Monitor

The Queue Monitor, shown in Figure 10-1, displays the calls that are ringing into your workgroups. The Queue Monitor is available in Workgroup Agent, Workgroup Supervisor, and Operator Call Manager.

To open the Queue Monitor, perform one of the following:

- Click the Application Button, then select ***Workgroup -> Queue Monitor.***
- Select ***Workgroup -> Queue Monitor*** from the Main Menu.
- Select ***Windows -> Queue Monitor*** from the Main Menu.
- Select ***Windows -> Queue Monitor*** from the Assignment bar.
- Right click the ShoreTel icon in the system tray and select ***Workgroup -> Queue Monitor***.
- Press Ctrl+Shift+Q.

The Queue Monitor opens in the Main window content area or in a Satellite window.

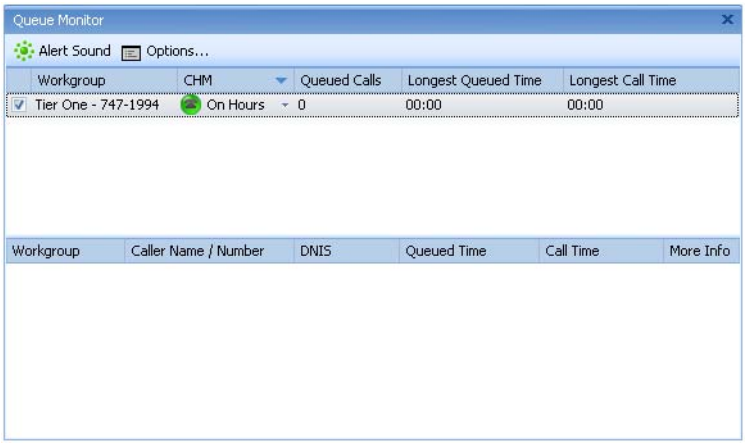


Figure 10-1 Queue Monitor

10.4.1.1 Viewer Components

The Queue Monitor comprises an action bar, a workgroup table, and a call table:

- **Action bar:** The action bar contains buttons that trigger workgroup configuration options and panels. Action bar buttons include:
  - — *Alert Sound:* Press this button to toggle the sound alert status. When this button is highlighted and a threshold is exceeded, Call Manager plays the audio alert designated by the Options and Preferences: Sounds panel.
  - — *Options:* Press this button to access the Options and Preferences: Workgroups panel.
- **Workgroup table:** The top table in the Queue Monitor lists selected Workgroups to which you belong. You specify the workgroups displayed in the table from the **Options and Preferences: Workgroups panel**.

  Each row corresponds to one workgroup. Each column corresponds to a workgroup property. Columns that the Workgroup table can display include:
  - — *Unlabeled Checkbox:* Select this check box to display Workgroup calls in the Call Table.
  - — *Workgroup:* This field lists the workgroup's name and extension.
  - — *CHM:* This column lists the active Call Handling Mode for the Group. Clicking in this cell accesses a drop-down menu that changes the call handling mode.
  - — *Queued Calls:* This field lists the number of calls in the workgroup's queue.
  - — *Longest Queued Time:* This field indicates the longest queue time of all calls in the queue.
  - — *Longest Call Time:* This field indicates the longest call time of all calls in the queue. This time differs from the longest queue time when calls are returned to the queue after an agent answers it.
- **Call table:** The bottom table lists the calls that are in the queues of the workgroups to which you belong. Each row corresponds to one call that is waiting in a workgroup's queue. Columns that the Call table can display include:
  - — *Workgroup:* This field lists the call's intended recipient workgroup
  - — *Caller Name / Number:* This field lists the Call ID information for the call.
  - — *Queued Time:* This field indicates the period that the call has waited in the queue.
  - — *Call Time:* This field indicates the period the call has been active including, for calls re-entering the queue after being by an agent, all periods the call was active and on hold.
  - — *DNIS:* This field displays the DNIS identification number sent by the originating call.
  - — *More Info:* This field displays miscellaneous call information including the routing slip and the call note.

10.4.1.2 Setting Thresholds

Workgroup Supervisors can specify queue size and queue time thresholds for a workgroup. Queue Monitor displays any values that exceed these thresholds in bold red text. Supervisors can also configure audible alerts to when queued calls result in exceeded thresholds.

The supervisor sets a Workgroup's warning thresholds that define the maximum number of queued calls and the maximum wait time allowed before the Queue Monitor displays a warning to all agents.

To set workgroup warning thresholds:

Step 1 Open the Options and Preferences window by performing one of the following:

- Press the ***Options*** button in the Queue Monitor menu bar.
- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select ***Options***.
- Right click the Call Manager icon in the System Tray and select ***Options***.
- Press Ctrl+O.

Step 2 Select ***Workgroups*** in the menu on the left side of the window.

Step 3 Specify the **Calls Size** threshold by clicking the ***Calls in Q*** cell for the desired workgroup.

Step 4 Specify the **Call Wait Time** threshold by clicking the ***Queued Time*** cell for the desired workgroup.

10.4.1.3 Setting Workgroup Call Handling Modes

The supervisor sets the Call Handling Mode for the workgroup in the *Queue Monitor*. There are four Call Handling Modes: On-Hours, Off-Hours, Holiday, and Custom. The workgroup Call Handling Mode changes the way calls are handled based on the current setting.

To change the workgroup Call Handling Mode, access the drop down menu by clicking the CHM button on the Queue Monitor menu.

10.4.2 Agent Monitor

The Agent Monitor, shown in Figure 10-2, displays the status of agents in your workgroups as specified in the Options and Preferences: Workgroups panel. Agent Monitor is available in Workgroup Supervisor and Operator Call Manager.

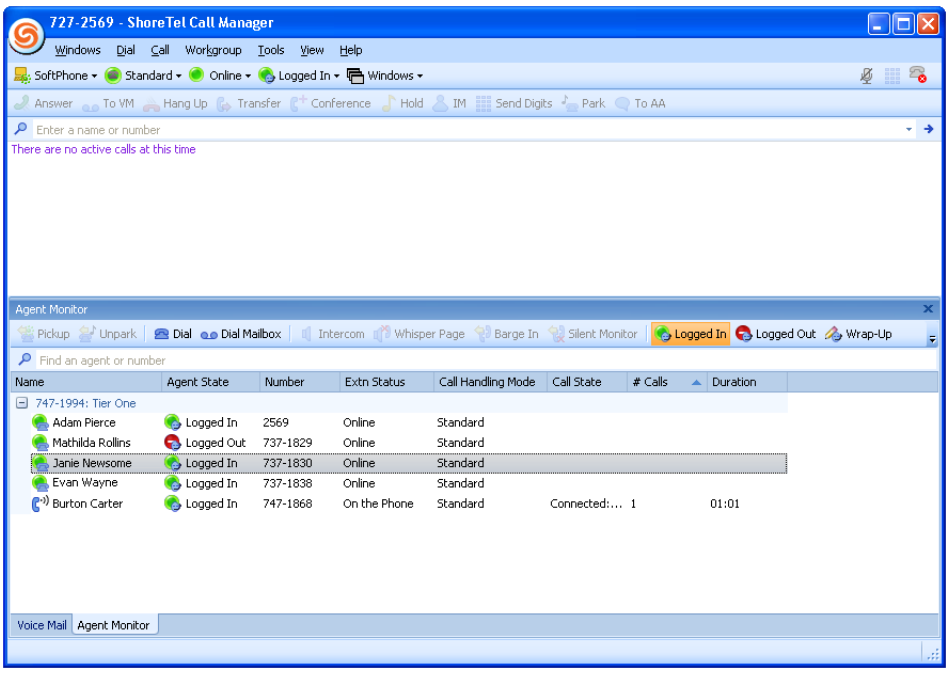

727-2569 - ShoreTel Call Manager
Windows Dial Call Workgroup Tools View Help
SoftPhone Standard Online Logged In Windows
Answer To VM Hang Up Transfer Conference Hold IM Send Digits Park To AA
Enter a name or number
There are no active calls at this time
Agent Monitor
Pickup Unpark Dial Dial Mailbox Intercom Whisper Page Barge In Silent Monitor Logged In Logged Out Wrap-Up
Find an agent or number
Name Agent State Number Extn Status Call Handling Mode Call State # Calls Duration
747-1994: Tier One
Adam Pierce Logged In 2569 Online Standard
Mathilda Rollins Logged Out 737-1829 Online Standard
Janie Newsome Logged In 737-1830 Online Standard
Evan Wayne Logged In 737-1838 Online Standard
Burton Carter Logged In 747-1868 On the Phone Standard Connected:... 1 01:01
Voice Mail Agent Monitor

Figure 10-2 Agent Monitor

To open the Agent Monitor, perform one of the following:

- Click the Application Button, then select ***Workgroup -> Agent Monitor.***
- Select ***Workgroup -> Agent Monitor*** from the Main Menu.
- Select ***Windows -> Agent Monitor*** from the Main Menu.
- Select ***Windows -> Agent Monitor*** from the Assignment bar.
- Right click the ShoreTel icon in the system tray and select ***Workgroup -> Agent Monitor***.
- Press Ctrl+Shift+A.

The Agent Monitor opens in the Main window content area or in a Satellite window.

10.4.2.1 Viewer Modes

Call Manager provides the following Agent Monitor view options:

- **Details –** Each agent is listed in an individual row, similar to the traditional Windows Explorer column view, and grouped by Workgroup. Agents can be sorted within their workgroups by clicking the column headings at the top of the list.
- **List –** Agents are displayed in a single column that shows their name and log status. Agents are listed alphabetically within their workgroups.
- **Small Icons –** This view displays all Agents without separating them into their workgroups. Phone status is displayed using small icons.
- **Large Icons –** This view displays all Agents without separating them into Workgroups. Phone status is displayed using large icons.

To select a viewer mode, right click in the Monitor table and select the desired mode.

10.4.2.2 Viewer Components

The Agent Monitor comprises an action bar, a workgroup table, and a call table:

- **Action bar:** The action bar contains buttons that trigger agent options and panels. Action bar buttons include:
  - ***Pickup:*** Press this button to pickup the call from the selected agent. This option only available to Operator Call Manager.
  - ***Unpark:*** Press this button to unpark a call from the selected agent. This option only available to Operator Call Manager.
  - ***Dial:*** Press this button to initiate a call to the selected agent.
  - ***Dial Mailbox:*** Press this call to call the selected agent's voice mailbox.
  - ***Intercom:*** Press this button to perform an intercom call to the selected agent.
  - ***Whisper Page:*** Press this button to initiate a whisper page to the selected agent.
  - ***Barge In:*** Press this button to barge into the selected agent's call.
  - ***Silent Monitor:*** Press this button to listen to the selected agent's call.
  - ***Logged In:*** Press this button to log the selected agent into the workgroup.
  - ***Logged Out:*** Press this button to log the selected agent out of the workgroup.
  - ***Wrap-Up:*** Press this button to change the selected agent's log status.
  - ***More Info:*** Press this button to display status and call handling information for the selected agent.
- **Filter bar:** The Agent list displays only entries whose name or number matches the the filter bar text. Filter bar contents are compared to columns that list name and contact information for the entries.

- **Agent List:** The Agent table lists the Agents in the Workgroups to which you belong. Each row corresponds to one agent. When viewing the table in Details mode, each column corresponds to an agent property or status indicator. Columns that the Agent table can display in Details mode include:
  - ***Name:*** This field lists the agent's name
  - ***Agent State:*** This field lists the agent's log state.
  - ***Number:*** This field lists the agent's extension.
  - ***Extn Status:*** This field lists the agent's phone status.
  - ***Call Handling Mode:*** This field indicates the agent's current call handling mode.
  - ***Call Handling Note:*** This field lists the agent's current call handling note.
  - ***Call Handling Details:*** This field indicates the call forwarding method specified by the agent's active call handling mode.
  - ***Call State:*** This field indicates the status of the call that the agent is handling.
  - ***# Calls:*** This field indicates the number of calls on the agent's call stack.
  - ***Duration:*** This field indicate duration of the call that the agent is currently handling.

  Agent Monitor also plays an audio alert while a new call rings any agent.

10.4.2.3 Context Menu Operations

You can perform most operations available on the Action bar through a context menu accessed by right clicking on an Agent.

Functions accessible through the Agent Monitor include:

- **Workgroup functions:** viewing and changing agent status
- **Call Monitor functions:** barge in, silent monitor, whisper page
- **Call Resumption functions:** Park and Pickup
- **Agent Contact options:** Dial, Dial Mailbox, Intercom

The Agent Monitor displays workgroup agents' call status and activities. The telephone icon next to an agent's name indicates call status and the number of calls the agent is handling. The connection icon displays the agent's logged on and wrap-up status.

To initiate a voice call to an agent's extension, perform one of the following:

- Double-click on the name of the desired contact
- Drag and drop the name of the desired contact into the Active Call Area in the Main Window.

To initiate any other call operation, right click on the desired contact and select the operation or phone number from the context menu.

10.4.3 Bridged Call Appearance Monitor

The Bridged Call Appearance Monitor, as shown in Figure 10-3, displays the Bridged Call Appearances for which your extension has devices configure to answer. Operator Call Manager is required to access the Bridged Call Appearance Monitor.

To display the BCA Monitor, as shown in Figure 10-3, perform one of the following:

- Click the Application Button and select ***Windows -> Bridged Call Appearance Monitor.***
- Select ***Windows -> Bridged Call Appearance Monitor*** from the Main Menu.
- Select ***Windows -> Bridged Call Appearance Monitor*** from the Assignment bar.

- Right click the ShoreTel icon in the system tray and select *Windows -> Bridged Call Appearance Monitor.*
- Press Ctrl+Shift+X.

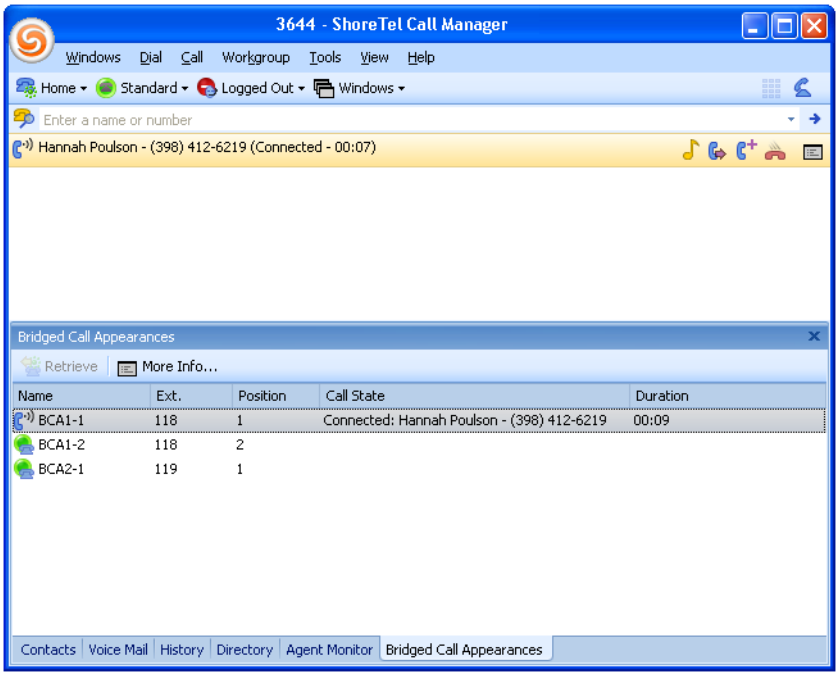

3644 - ShoreTel Call Manager
Windows Dial Call Workgroup Tools View Help
Home Standard Logged Out Windows
Enter a name or number
Hannah Poulson - (398) 412-6219 (Connected - 00:07)
Bridged Call Appearances
Retrieve More Info...
Name Ext. Position Call State Duration
BCA1-1 118 1 Connected: Hannah Poulson - (398) 412-6219 00:09
BCA1-2 118 2
BCA2-1 119 1
Contacts Voice Mail History Directory Agent Monitor Bridged Call Appearances

Figure 10-3 Bridged Call Appearance Monitor

10.4.3.1 Bridged Call Appearance Description

A BCA is an extension that is shared among multiple users. A BCA is characterized by an extension number and its call stack depth. The extension number defines the method of contacting BCA users. The call stack depth specifies the number of call that can simultaneously reside on the BCA. The maximum BCA stack size is 24. Bridged Call Appearances are configured by the system administrator.

Calls into a BCA occupy distinct call appearances and are identified by their position in the call stack. ShorePhone buttons that answer calls are configured to handle calls to a specific call stack position of a BCA.

Example: The system administrator configures a BCA with an extension of 118 and a call stack depth of 3. The ShorePhones of three users are configured to handle calls to the BCA as follows:

- User One has one button that answers calls from Stack Position #1.
- User Two has one button that answers calls from Stack Position #2.
- User Three has three buttons configured to answer BCA calls – the first button answers calls to Stack Position #1, the second button answers calls to Stack Position #2, and the third button answers calls to Stack Position #3.

The first incoming call to the BCA arrives on Stack Position #1. User Two cannot answer this call. A second call to the BCA will arrive on Stack Position #2 if the first call is still active. User One cannot answer that call. User Three is the only user that can answer calls that arrive on Stack Position #3.

10.4.3.2 Bridged Call Appearance Monitor Components

The Bridged Call Appearance Monitor displays all call stack positions for each BCA extension for which your extension can receive calls. Each row in the table corresponds to one BCA call stack position. Each column lists an identifying property of the call stack position or of the call to the BCA that occupies the call stack position.

Bridged Call Appearance in Details mode include:

- **Filter bar:** The BCA Monitor displays only entries whose sender name or number matches filter bar contents. Filter bar contents are compared to columns that list name and contact information.
- **Action bar:** The action bar contains buttons that trigger actions or display status relative to the selected BCA stack position. Action bar buttons include:
  - *Retrieve:* Press this button to access a ringing or parked call.
  - *More Info:* Press this button to display call information, including the phone number and call duration.
- **Column Headings:** Column headings indicate the data field name for the BCA call stack position.
  - *Name:* This field lists the name of the BCA call stack position, as specified by the system administrator.
  - *Ext.:* This field displays the BCA extension number.
  - *Position:* This field displays the call stack position.
  - *Call State:* The field lists the state of the call occupying the call stack position.
  - *Duration:* This field displays the period that the call on the call stack position has been active.

10.4.3.3 Viewer Modes

You can specify the BCA Monitor viewer mode by right clicking in the table and selecting the desired mode. Each view includes a control field, similar to QuickDialer, that filters the agents displayed by the monitor.

Call Manager provides the following BCA Monitor views:

- **Details –** Each BCA stack position is listed in an individual row, similar to the traditional Windows Explorer column view. The table displays the columns in Details mode.
- **List –** BCA stack positions are displayed in a single column that shows their extension and stack position.
- **Small Icons –** This view displays BCA stack positions as small icons that indicate call status.
- **Large Icons –** This view displays BCA stack positions as large icons that indicate call status.

10.4.3.4 Caller ID and Bridged Call Appearances

The following rules determine which caller ID is displayed when an outgoing call is made using BCA:

- **Outbound to an internal extension –** the name and number of the user that initiated the BCA call is displayed; if that user is a “private” user, then the caller ID is blank.

- **Outbound to an external number –** the following caller ID options are displayed in the following priority, based on availability:
  - Outbound caller ID configured for that BCA
  - DID number configured for that BCA
  - External identification or caller ID number of the BCA call initiator
- **Outbound to an external emergency number (such as 911) –** the emergency identification or a CESID number of that user will be sent.

10.5 Viewer Enhancements

The Voice Mail and Contacts Viewers provide enhanced capabilities to users of Workgroup Agent, Workgroup Supervisor, and Operator Call Manager. The following sections describe the enhanced capabilities of these viewers.

10.5.1 Voice Mail Viewer

Each workgroup has its own workgroup mailbox in the ShoreTel *Voice Mail Viewer*, and each member of the workgroup can access this mailbox.

The workgroup mailbox has its own Inbox, Saved, and Deleted folders that appear separate from the user's personal mailbox folder in the ShoreTel Voice Mail Viewer. Incoming workgroup messages appear in the workgroup Inbox. When you save or delete workgroup messages, they are sent to the workgroup's Saved or Deleted folders.

The Voice Mail Viewer displays messages to your workgroups in addition to messages to your extension. The Viewer displays messages to each entities in blocks. In Figure 10-4, the personal messages to Ted Coates are grouped in the first block and messages to Tier One workgroup are grouped in the second block.

Section 9.3 on page 109 describes Voice Mail Viewer features and functions.

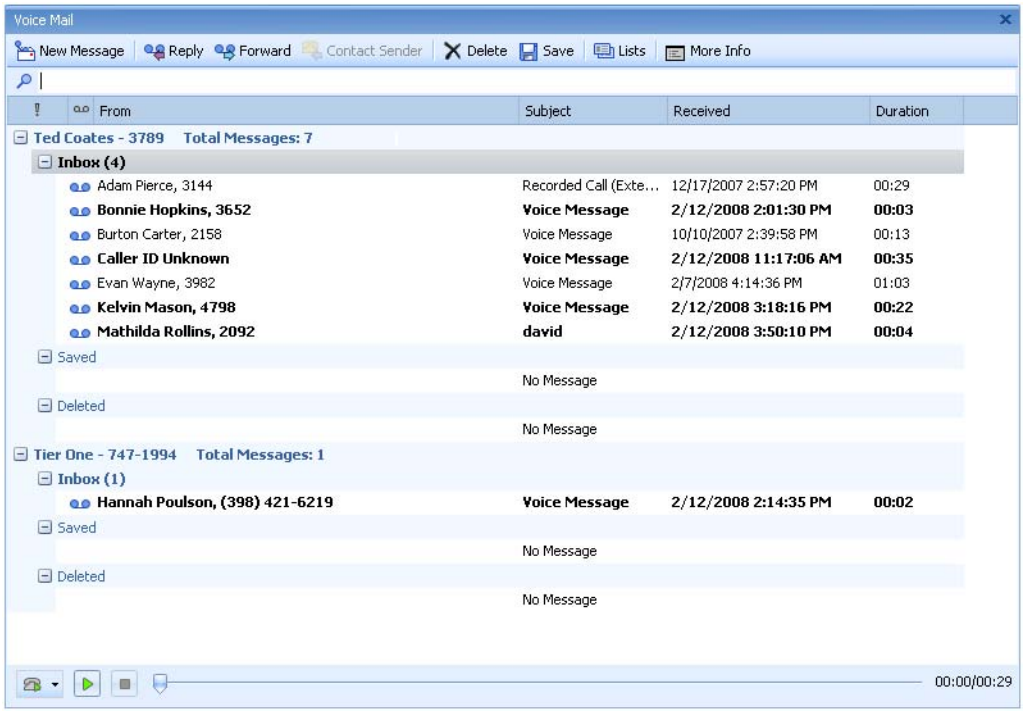


Figure 10-4 Voice Mail Viewer – Workgroups

10.5.2 Contacts Viewer

The Contact viewer provides access to Contact Lists, which are subsets of your directory entries. In addition to the basic functionality described in Section 8.3 on page 92, Workgroup Agents, Workgroup Supervisors, and Operators can transfer calls to contacts through drag and drop operations of a call cell to a contact.

The Contact viewer for operators provide an Action bar, through which Park, Pickup, and other call operations are available.

CHAPTER 11

Contact Center

11.1 Introduction

The ShoreTel Contact Center is a software application that controls, manages, and monitors call center activities. Contact Center controls interactions with customers through a system of four interlocking components:

- **Call routing** implements business rules that define customer service and resource allocation.
- **Monitoring of call center operations** to provide supervisors with information required to manage daily operations.
- **Performance measurement** through historical reports gives supervisors an "aerial view" of operations from the perspective of business objectives, and captures information that management can use to make policy decisions.
- **Agent tools** extend the ability of your knowledge workers to provide effective service.

Contact Center connects to ShoreWare though a software interface over an IP Network. All Contact Center functionality is access through a separate suite of application tools, including an Agent Toolbar, Supervisor Monitoring Tools, Historical Reports, and a software wall board.

Contact Center features are available through all Call Manager types to users authorized by the system administrator. The Main Menu bar provides a Contact Center menu for users with Contact Center access rights.

ShoreWare Workgroups is distinct from ***Contact Center*** features and functionality. Workgroup features cannot be used to perform Contact Center functions and Contact Center features cannot be used to perform Workgroup functions.

For a detailed description of all Contact Center features, refer to the following ShoreTel manuals:

- Contact Center Administration Guide
- Contact Center Agent Toolbar
- Contact Center CRM Installation Guide
- Contact Center Installation Guide
- Contact Center Supervisor Applications Guide

11.2 Requirements

Contact Center agents can access Contact Center through Call Manager only on PCs upon which Contact Center Agent Bar and Call Manager are installed.

Contact Center Supervisors can access Contact Center through Call Manager only on PCs upon which Contact Center Agent Bar, Contact Center Supervisor Applications, and Call Manager are installed.

To use Call Manager for performing Contact Center operations, a Contact Center Supervisor must also be configured as a Contact Center Agent.

For complete information on configuring Contact Center components, refer to Contact Center documentation.

11.3 Configuring Contact Center Options

To configure the Contact Center options, perform the following:

Step 1 Open Call Manager. The panel in Figure 11-1 appears the first time Call Manager is opened after integrated Call Manager is enabled for the user.

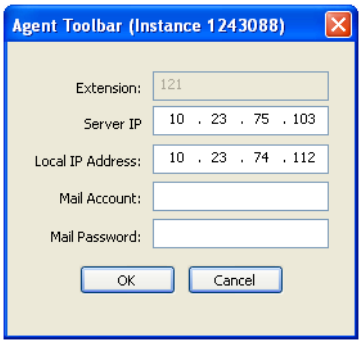


Figure 11-1 Configuring the IP addresses for the agent toolbar

The Setup window is configured once. If it has not been configured, the Agent Toolbar opens this dialog the first time it is executed. This dialog box offers a manual way to enter IP addresses or mail account information.

- **Server IP –** The address of the Contact Center Server
- **Local IP Address –** The address of the agent's client machine
- **Mail Account –** The Personal Email Username for Contact Center – not an email address. Refer to the ShoreTel Contact Center Administration Guide.
- **Mail Password –** this is the agent's password that is associated with the Personal Email Username

  Mail Accounts allows agents to receive email from callers through standard email programs, such as Outlook or Outlook Express. Email accounts are configured for each inquire type and email received in these accounts are placed in a queue where an agent can download a predetermined number of emails. Mailboxes can be assigned to a specific computer or agent.

Step 2 Verify the information in the setup window, then select ***Contact Center -> Configure Call Center*** from the Call Manager main menu.

Call Manager displays the Contact Center Options panel shown in Figure 11-2.

Step 3 Click on the Configure Groups button from the Contact Center Options window to display the Group manager window shown in Figure 11-3.

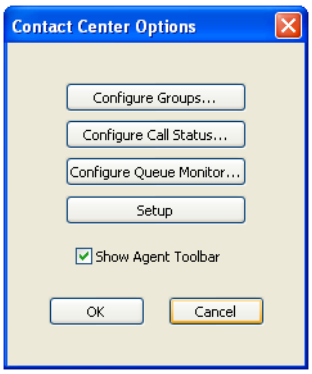


Figure 11-2 The Contact Center Options window

Figure 11-3 Logging into and out of workgroups

Step 4 The Group manager window allows you to log into or out of select contact center groups. To log into a group, click a group name from the "Available Groups" pane (on the right) to highlight it. Then, click the Login button to move that group to the "Logged Groups" pane on the left.

Step 5 Next, click the Configure Call Status button from the Contact Center Options window to display a window similar to the one shown in Figure 11-4.

Step 6 This window allows you to determine which blocks of information will appear in the agent Call Status window (shown on the next page). Click any of the parameters from the "Available Fields" pane on the right, and then click the << button to move the selected parameter to the "Selected Fields" pane on the left.

The agent Call Status window displays information about a current call that has been answered by this agent. Information is displayed with the selected fields listed across the top, as shown in Figure 11-5.

The Call Status window can display information for multiple calls. The window displays information about how long the caller has been waiting, the priority of the call. And if the agent belongs to multiple groups, the window will provide information about which group the call originated from.

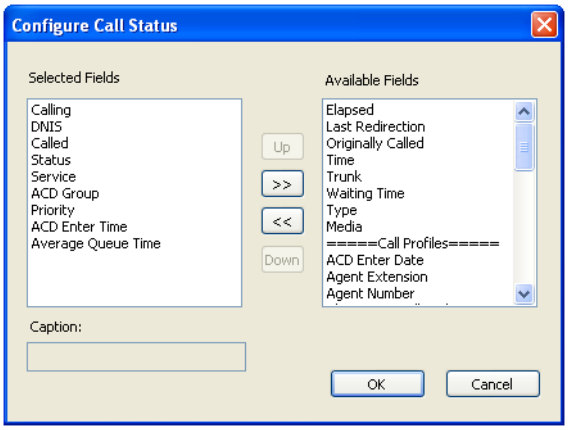


Figure 11-4 Selecting parameters for display

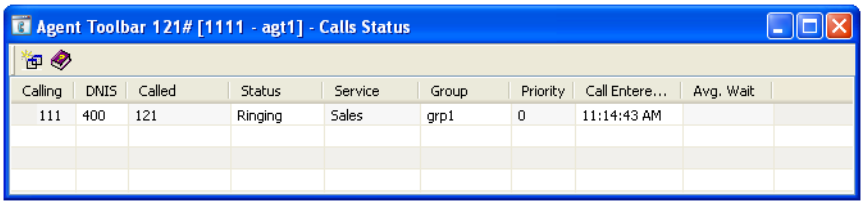

Agent Toolbar 121# [1111 - agt1] - Calls Status
Calling DNIS Called Status Service Group Priority Call Entere... Avg. Wait
111 400 121 Ringing Sales grp1 0 11:14:43 AM

Figure 11-5 Call status fields in the agent toolbar

Step 7 Next, click the Configure Queue Monitor button from the Contact Center Options window. The dialog box used to configure the Queue Calls window is similar to that shown in Figure 11-5 for configuring the Call Status window. You should select click the desired parameters from the “Available Fields” pane and move them to the “Selected Fields” pane on the left.

After the configuration is selected, the Queue Calls window appears, as shown in Figure 11-6.

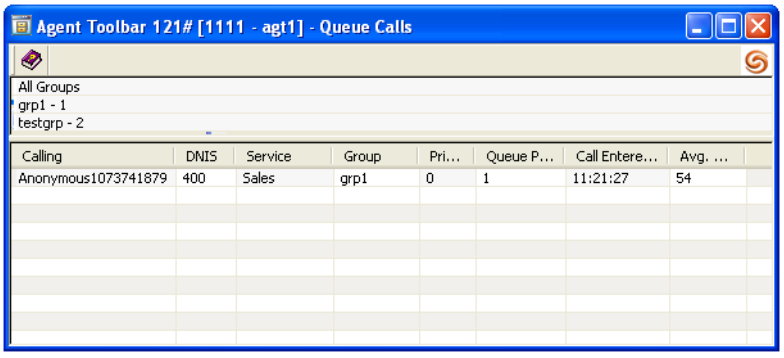

Agent Toolbar 121# [1111 - agt1] - Queue Calls
All Groups
grp1 - 1
testgrp - 2
Calling DNIS Service Group Pri... Queue P... Call Entere... Avg. ...
Anonymous1073741879 400 Sales grp1 0 1 11:21:27 54

Figure 11-6 Queue monitor

The Queue Monitor is similar to the Agent Call Status window in that it provides information about incoming calls, but it is different in that it displays information for calls that have not been answered. An additional difference is that the Queue Calls window allows users with the proper permissions, as defined in the Class of Service, to double-click a particular call to answer it.

Step 8 Select the Show Agent Toolbar check box from the Contact Center Options window to display the Contact Center Agent Toolbar, similar to the one in Figure 11-7.

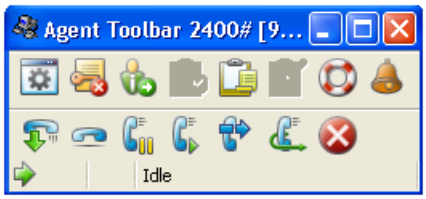


Figure 11-7 Agent Toolbar functions

The Agent Toolbar offers an optional method of accessing the Contact Center features and application windows. Because the Agent Toolbar offers access to many of the same functions and features as the integrated Call Manager window, having both open at the same time may be redundant and unnecessary, but it can ease the transition from Contact Center to the new unified interface.

11.3.1 Accessing Contact Center Features from Call Manager

- Depending on how the programmable buttons were configured, many of the functions shown in the Agent Toolbar in Figure 11-7 will be the same as those that now appear in the integrated Call Manager and Contact Center user interface.
- Supervisors can access certain capabilities by clicking on the highlighted buttons shown in Figure 11-7.
- The following functions can be performed from the Agent Toolbar:
  - Telephony Operations
  - ACD Operations
  - Application Windows
  - Chat Operations
  - Other Operations

11.3.2 Contact Center Feature Limitations in Call Manager

The Contact Center Agent Toolbar includes a status bar, shown in Figure 11-8, that displays caller and call status information. Status bar information is not available through Call Manager. Information displayed by the status bar that is not available through Call Manager includes:

- Type of call the agent is servicing: voice call, email interaction, or chat interaction.
- *Call Profile* information collected from the IVR or configured in Contact Center. The Call Status window in Call Manager displays the Call profile fields.
- Indicators that an agent is scheduled for an outbound call programmed by Contact Center Dial Lists, abandoned callbacks, and scheduled callbacks.

  When *Agent Notification Preview* is enabled in Contact Center, Call Manager receives notification of programmed call before they are placed.

Call manager does not have ring tone options to distinctly identify the inbound call type on the agent desktop. Call manager signals an incoming Contact Center call in the same manner as all other calls.

Figure 11-8 Status Bar in Contact Center Agent Toolbar

Contact Center upgrades for the agents and supervisors are distinct from Call Manager upgrades for new software releases. Version updates for new Contact Center releases that require an update for agents and supervisors must be performed as described by Contact Center installation documentation and are not affected by Call Manager upgrades.

11.4 Using Contact Center through Call Manager

You can use the Contact Center menu in Call Manager to access the Contact Center login feature and other functions.

Step 1 Select *Contact Center -> Login Primary Groups* to login into the primary groups.

If you are already logged in, you can select Logout Primary Groups to exit from the primary groups of which you are a member.

This operation can be assigned to a programmable buttons in Call Manager.

Step 2 Verify that you successfully logged into a contact center group by viewing the Logged In icon in the Assignment bar, as shown in Figure 11-9.

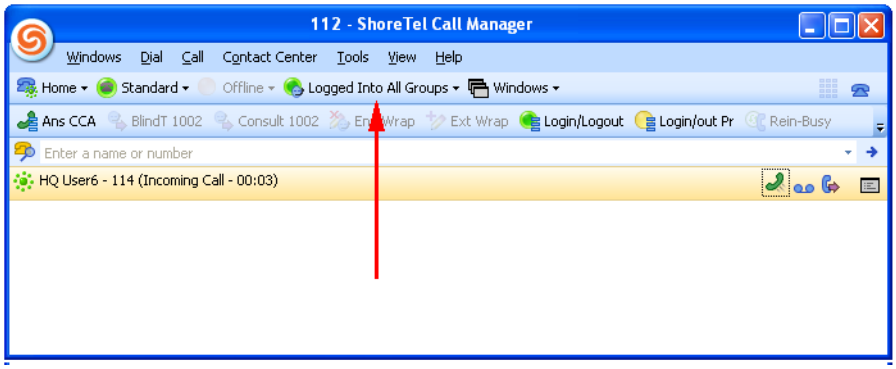

112 - ShoreTel Call Manager
Windows Dial Call Contact Center Tools View Help
Home Standard Offline Logged Into All Groups Windows
Ans CCA BlindT 1002 Consult 1002 Ext Wrap Ext Wrap Login/Logout Login/out Pr Rein-Busy
Enter a name or number
HQ User6 - 114 (Incoming Call - 00:03)

Figure 11-9 Contact Center Log In Indicator

- If you are not logged into at least one contact center group, the login icon states *Logged Out*.
- If a problem occurs while logging into the contact center, the status bar displays *System Unavailable*.

Figure 11-10 displays Call Manager and the Contact Center toolbar when receiving a Contact Center call.

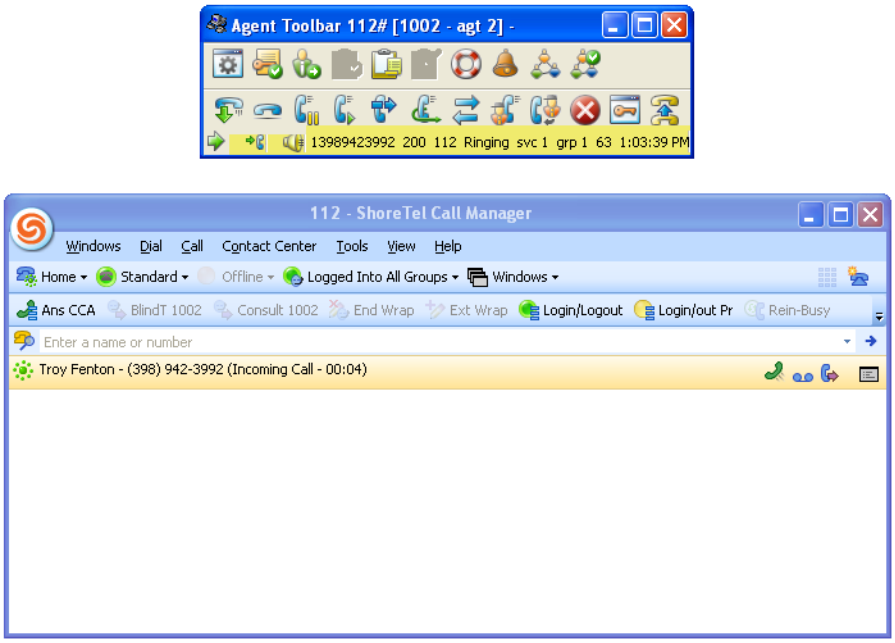

Agent Toolbar 112# [1002 - agt 2] -
13989423992 200 112 Ringing svc 1 grp 1 63 1:03:39 PM
112 - ShoreTel Call Manager
Windows Dial Call Contact Center Tools View Help
Home Standard Offline Logged Into All Groups Windows
Ans CCA BlindT 1002 Consult 1002 End Wrap Ext Wrap Login/Logout Login/out Pr Rein-Busy
Enter a name or number
Troy Fenton - (398) 942-3992 (Incoming Call - 00:04)

Figure 11-10 Receiving Contact Center Call Through Call Manager

CHAPTER 12

Outlook Integration

12.1 Introduction

For Microsoft Outlook users, Call Manager supports integration with Outlook inbox, voice mail and calendar features. This Chapter describes Outlook integration features and procedures.

12.2 Importing Outlook Contacts

You can configure Call Manager to include Microsoft Outlook contacts in the Directory viewer every time you log into Call Manager. Outlook contact import options include:

- Open the Outlook Contacts panel when you receive a call.
- Cache Outlook Contacts: Outlook contacts remain available to Call Manager until you logout. They are not added to the permanent ShoreWare database, where Call Manager settings resides. This limitation requires the import of Outlook contacts each time Call Manager is started.

  You cannot access Outlook contacts while they are being imported into Call Manager. Caching Outlook Contacts provides immediate access to your Outlook Contacts upon logging into Call Manager.

To import Outlook contacts to the Call Manager

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Outlook*** in the menu on the left side of the window.

Step 3 Select ***Import contacts from Outlook***.

Outlook contacts are accessible from the Directory Viewer. The Data Source column indicates the directory entries that were imported from Outlook.

To program Call Manager to activate the Outlook Contacts panel when you receive a call:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.

- Press Ctrl+O.

Step 2 Select ***Outlook*** in the menu on the left side of the window.

Step 3 Select ***Open Outlook Contacts when Calls Arrive***

To program Call Manager to cache Outlook Contacts:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Outlook*** in the menu on the left side of the window.

Step 3 Press the ***Import Options*** button on the top right corner of the panel.

Step 4 Select ***Enable disk caching*** on the **Disk Cache Options panel**.

Step 5 Configure other Caching parameters on the panel.

12.3 Configuring Outlook for Voice Mail

You can configure Call Manager to integrate voice mail with Microsoft Outlook. When you integrate voice mail with Outlook, voice messages appear in your Outlook Inbox.

To install or uninstall Outlook voice mail integration, perform the following:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Outlook*** in the menu on the left side of the window.

If Voice Mail Integration is installed, the Voice Mail section displays an ***Uninstall*** button and the following text: **Outlook Voice Mail Integration is installed**.

If Voice Mail Integration is not installed, the Voice Mail section displays an ***Install*** button and the following: **Voice Mail integration with Outlook is not currently installed.**

Step 3 To install Voice Mail Integration, press the ***Install*** button located right of the voice mail integration status text.

To remove Voice Mail Integration, press the ***Uninstall*** button located right of the voice mail integration status text.

The Voice Mail integration section also provides options for handling voice mail files:

- **Attach Voice Mail from Message when Moved:** When this parameter is selected, moving an email from the Outlook Inbox to another folder results in the copying of the attached Voice Message .wav file to the Outlook message file.

- **Delete Voice Mail from Message when Moved:** When this parameter is selected, moving an email from the Outlook Inbox to another folder results in the removal of the attached Voice Message from the ShoreWare server.

12.4 Outlook Calendar Integration

Calendar Integration provides Outlook to use your ShoreWare call handling mode settings to manage your appointments.

12.4.1 Installing Calendar Integration

To install or uninstall Outlook Calendar integration, perform the following:

Step 1 Open **Options and Preferences** by performing one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the ShoreTel icon in the System Tray and select **Options**.
- Press Ctrl+O.

Step 2 Select ***Outlook*** in the menu on the left side of the window.

If Calendar Integration is installed, the Voice Mail section displays an ***Uninstall*** button and the following text: **Outlook Calendar Integration is installed**.

If Calendar Integration is not installed, the Voice Mail section displays an ***Install*** button the following: **Calendar integration with Outlook is not currently installed**

Step 3 To install Voice Mail Integration, press the ***Install*** button located right of the voice mail integration status text.

To remove Voice Mail Integration, press the ***Uninstall*** button located right of the voice mail integration status text.

The Calendar integration section also provides options for handling voice mail files:

- **Use Outlook appointments to change Call Handling Mode:** When this parameter is selected, you can program Outlook to change your ShoreWare Call Handling mode on the basis of appointments listed in your Outlook Calendar.

12.4.2 Configuring Outlook for Automatic Call Handling

You can set Call Manager to use your Outlook Calendar to determine your active Call Handling Mode.

To configure Outlook for automatic call handling

Step 1 On the Outlook toolbar, click the **Configure Call Handling** icon.

The ***Outlook Call Handling Configuration*** dialog box appears.

Step 2 Select the ***Use Outlook Calendar to handle Call Handling*** check box.

Step 3 Select the desired Call Handling Mode for on-hours and off-hours in the ***Work Week Call Handling Mode*** section and the desired holiday Call Handling Mode in the ***Holiday Call Handling Mode*** section.

Step 4 Click **OK** to close the dialog box.

To set your work week on/off hours in Outlook:

Step 1 Open the **Tools** menu in Outlook Calendar and select **Options**.

Step 2 Click the **Preferences** tab and click **Calendar Options**.

For call handing to be changed based on your on/off hours, this feature must be enabled in both the **Outlook** tab of the ***ShoreTel System*** dialog box and in Outlook.

12.4.3 Configuring Call Handling for an Appointment

When you make an appointment on your Outlook calendar, you can trigger the transition to a Call Handling Mode at the time of the appointment.

To configure your Outlook calendar appointment for call handling

Step 1 In Outlook, click **New**.

A menu list appears.

Step 2 Click the **Appointment** tab.

The ***Appointment*** dialog box appears.

Step 3 Click the **Call Handling Mode** tab.

Step 4 Select the desired **Call Handling Mode** options. The default setting is "Do Not Change My Call Handling Mode," which means that call handling will remain in the mode established automatically for this time period (on-hours, off hours, or holiday).

Step 5 Click **Remind Me** if you want a reminder to be displayed on your desktop when your Call Handling Mode is changed.

Step 6 Click **Save and Close** to confirm the changes and close the dialog box.

For call handling to be changed based on appointments, **Use Outlook appointments to change Call Handling Mode** must be enabled in the Call Manager Options and Preferences: Outlook panel and this feature must be enabled in Outlook.

12.4.4 Changing and Cancelling Automatic Call Handling

When Outlook is configured for automatic call handling, the call handling mode that you select for an appointment is active during the appointment. You can modify the scheduled call handling before the appointment.

To change or cancel automatic call handling for an appointment

Step 1 In Outlook, open the appointment for which you want to modify the automatic call handling selection. Cancelling the call handling selection causes the mode to change back to the default call handling mode.

Step 2 Click the **Call Handling Mode** tab.

Step 3 Change the call handling mode to one of the radio buttons on the left side. Choose Do Not Change to maintain the default call handling mode.

Step 4 Click Save and Close.

When the appointment occurs, the selected call handling mode is activated. If you choose **Do Not Change**, the call handling mode is set to the default mode chosen during the configuration of Outlook for automatic call handling during the appointment hours (on-hours and off-hours).

If you select **Remind Me** when setting the call handling mode, a reminder dialog box confirming the active call handling mode changed. Select one of the following:

- **Dismiss** to change the call handling mode.
- **Cancel** to maintain the call handling mode that was active before the start of the meeting.

If you open the **Call Handling Mode** tab again after clicking Cancel when the reminder dialog box appears, you will see that the radio button for the call handling mode option you originally chose for the appointment is still selected on the left side of the dialog box. On the right side of the dialog box, the option ***Change to call handling mode has been cancelled*** is also selected.

APPENDIX A

Options and Preferences Window

A.1 Introduction

The Options and Preferences window contains panels that configure many Call Manager options, components, and functions including Instant Messaging, Call Handling Modes, Video Calls, and Presence. The list of available panels depend upon the features for which the user is authorized.

To display the Options and Preferences window, perform one of the following:

- Select ***Tools -> Options*** from the Main menu.
- Click the Application Button and select **Options**.
- Right click the Call Manager icon in the System Tray and select **Options**.
- Press Ctrl+O.

A.2 Panel Descriptions

Panels in the Options and Preferences window are accessed by clicking panel names in the menu on the left side of the window. The following sections describe Options and Preferences panels in the order that they appear in the menu.

A.2.1 General panel

The General panel, shown in Figure A-1, determines Call Manager startup behavior and appearance settings.

To access the General panel, open the **Options and Preferences** window and select ***General*** in the menu on the left side of the window.

General panel parameters include:

- **Start Call Manager when you login to Windows:** Select this option to automatically open Call Manager every time you login to windows.
- **Enable drag-and-drop Window arrangement:** When this option is selected, Call Manager allows the movement of viewers between the Main Window Content Area and Satellite windows. Section 3.1.3 on page 24 describes the movement of viewers between the windows.
- **Color Scheme:** This option specifies the background color of Call Manager windows and panels.

A.2.2 QuickDialer

The QuickDialer panel, shown in Figure A-2, configures QuickDialer field characteristics. Refer to Section 3.1.2.5 on page 22 for a complete description of QuickDialer.

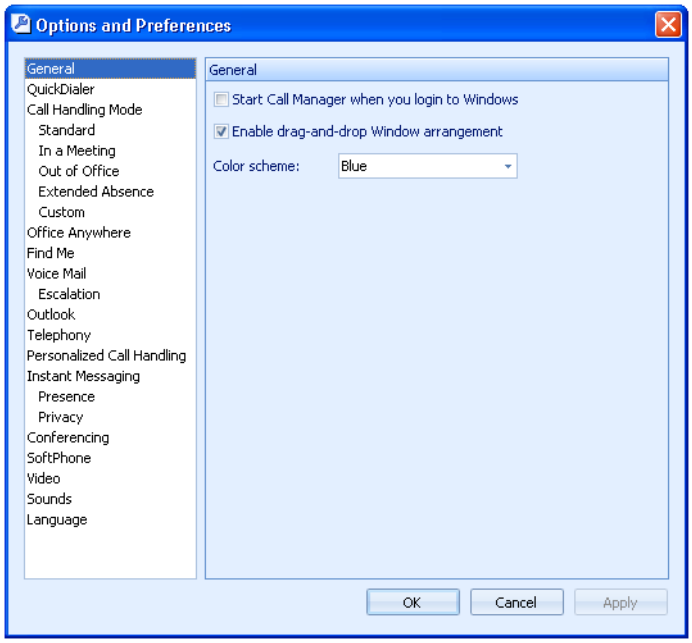


Figure A-1 Options and Preferences: General panel

To access the QuickDialer panel, open the **Options and Preferences window** and select ***QuickDialer*** in the menu on the left side of the window.

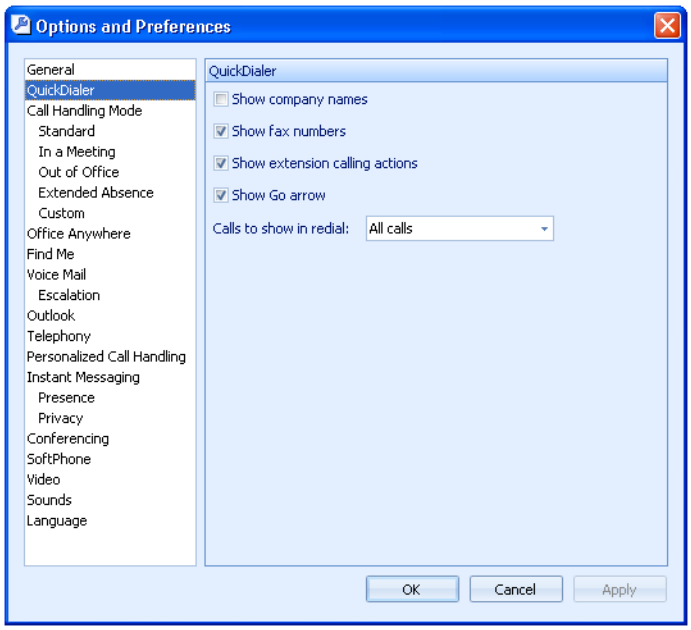


Figure A-2 Options and Preferences: QuickDialer panel

- **Show company names**: Select this option to include company entries in your QuickDialer lists.
- **Show fax numbers**: Select this option to include fax number entries in your QuickDialer lists. Selecting this option also displays fax numbers in Directory Viewer context menus that you access when right clicking an entry.

- **Show extension calling actions:** Selecting this option configures QuickDialer to display available methods of contacting filtered extensions.
- **Show Go arrow:** Selecting this option displays a Go arrow on the right side of the QuickDialer field. Pressing the Go arrow initiates a call to the contact that QuickDialer displays.
- **Calls to show in redial:** The Redial icon, located on the right side of the QuickDialer field, displays calls recently made and received, as specified by this parameter setting.
  - — *Outbound Calls:* Select this option to display only previously called numbers.
  - — *Missed Calls and outbound calls:* Select this option to display only numbers of missed inbound calls and previously made outbound calls.
  - — *All calls:* Select this option to display numbers of all of your inbound and outbound calls.

A.2.3 Call Handling Mode

The active Call Handling Mode determines the settings that Call Manager uses to handle your inbound calls. The Call Handling Mode panel, shown in Figure A-3, specifies the active Call Handling Mode. Refer to Section 4.5.4.2 on page 41 for more information about the active Call Handling Mode.

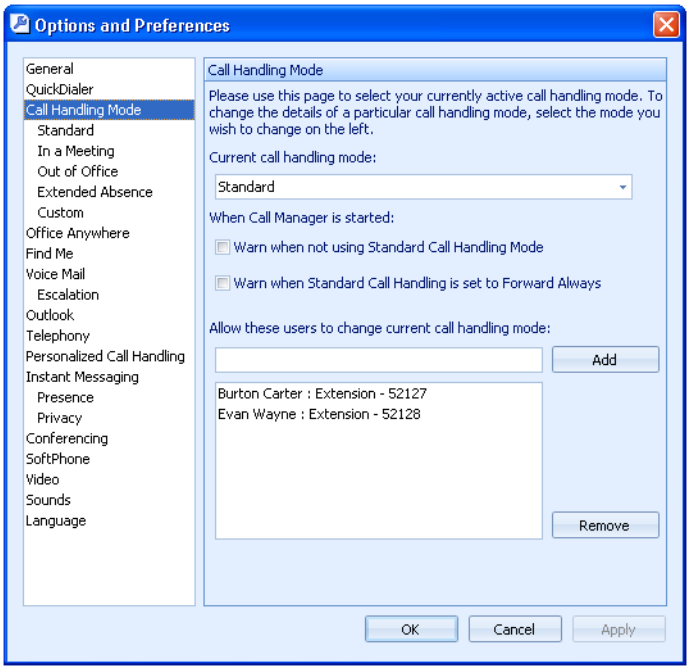


Figure A-3 Options and Preferences: Call Handling Mode panel

To access the Call Handling Mode panel, open the Options and Preferences window and select *Call Handling Mode* in the menu on the left side of the window.

Call Handling Mode panel parameters include:

- **Current call handling mode** determines the active method of handling inbound calls. One mode is always current.
- **When Call Manager is started** options enable call handling mode warnings:

— ***Warn when not using Standard Call Handling Mode –*** Select this option to receive a warning if the **active Call Handling Mode** is not *Standard* when you start Call Manager

— ***Warn when Standard Call Handling is set to Forward Always –*** Select this option to receive a warning if the **active Call Handling Mode** is *Standard* and the **Forward Calls** parameter is set to *Always* when you start Call Manager.

- **Allow these users to change current call handling mode:** This option supports Call Handling Mode Delegation, as described in Section 4.5.4.4 on page 44. The edit box is a Quick Dial type window. Entering a name or number in the data entry field results in a drop down menu that lists all matching user name or number. The drop down only displays user extensions. Workgroups and system extensions are not displayed.

  The table below the edit box contains the list of users allowed to change the current call handling mode of the subject.

  — **Add button:** Click this button to add the user listed in the edit box to the table.

  — **Remove button:** Select this button to remove the highlighted user/users from the List of users.

A.2.4 Mode Configuration Panels

Mode Configuration panels configure call handling methods when the specified call handling mode is active. The Option and Configuration window provides access to five Call Handling Mode Configuration panels, one for each of ShoreWare call handling mode.

Figure A-4 displays the Standard Mode Call Handling configuring panel. The other panels are identical in appearance and differ in the available settings for some of the parameters.

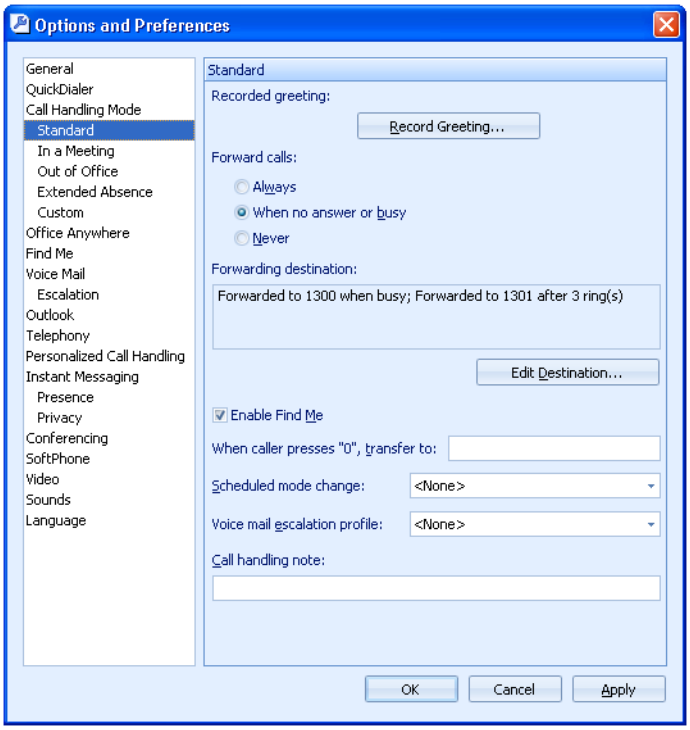


Figure A-4 Options and Preferences: Standard Call Handling Mode panel

Refer to Section 4.5.4 on page 41 for Automated Call Handling information.

To access a Call Handling Mode configuration panel, open the **Options and Preferences** window and select one of the following panels from the menu on the left side of the window: ***Standard, In a Meeting, Out of Office, Extended Absence,*** or ***Custom***.

Mode Configuration panel parameters include:

- **Recorded Greeting:** Press this button to record the greeting that callers receive when they reach your voice mailbox.
- **Forward Calls:** This parameter specifies conditions for forwarding inbound calls.
  - ***Always:*** When selected, all inbound calls are sent to the number listed in the **Forwarding Destination** box.
  - ***When no answer or busy:*** When selected, inbound calls are directed to one of two numbers listed in the **Forwarding Destination** box.

    One number lists the destination when the call was not answered after a specified number of rings. The other number lists the destination when the call was not answered because the line was busy.
  - ***Never:*** Selecting this option disables call forwarding.
- **Forwarding Destination:** This parameter displays the destination of your calls that are forwarded and the number of times your phone rings before the call is forwarded. To change the Call Forwarding Destination, press the **Edit Destination** button.
  - When ***Call Handling Condition*** is *Always*, the field displays one number that receives all of your inbound calls.
  - When ***Call Handling Condition*** is *When No Answer or Busy,* the field displays two numbers:

    One number specifies a destination for unanswered calls after a specified number of rings.

    One number specifies a destination for unanswered calls when the line is busy.
  - When ***Call Handling Condition*** is *Never,* the field displays no forwarding numbers.
- **Enable Find Me:** This box enables *Find Me* call handling when the specified Call Handling Mode is active. Refer to Section 4.5.6 on page 51.
- **When caller presses '0', transfer to:** This field designates the recipient of your call when the caller presses 0 (zero) while listening to the voice mail greeting.
- **Scheduled mode change:** This field specifies the ShoreWare schedule that determines the default period for the specified Call Handling Mode. Section 4.5.4.2 on page 41 describes the correlation between schedules and call handling modes.
- **Voice mail escalation profile:** Escalation profiles specify a list of contacts that are notified when Call Manager forwards your calls. Escalation profiles are used for periods when you may receive calls that require immediate attention.

  Refer to Section 9.5.3 on page 116 for information about Notification Escalation.
- **Call Handling Note:** A Call Handling Note is a text stream provided to the operator who monitors your extension. Notes provide additional information, such as when you plan to return. The Contacts panel displays Call Handling notes. Workgroup Supervisors can also view notes on the Agent Monitor.

A.2.5 Office Anywhere

Office Anywhere is a ShoreWare feature that allows users to reassign their extensions to any phone connected to the ShoreTel System or remote devices accessible to the network, including home phones and mobile devices. Access to Office Anywhere requires system administrator authorization. Refer to Section 4.2.3 on page 34 for more information about Office Anywhere.

The **Office Anywhere** panel, shown in Figure A-5, specifies the Office Anywhere device, configures other Office Anywhere settings, and activates Office Anywhere for your extension.

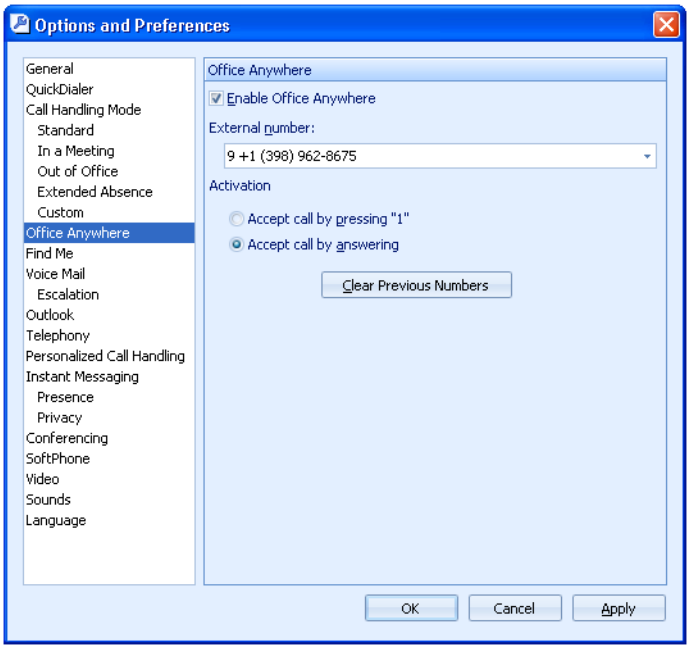


Figure A-5 Options and Preferences: Office Anywhere panel

To access the Office Anywhere panel, open the **Options and Preferences** window, then select ***Office Anywhere*** in the menu on the left side of the window.

Office Anywhere panel parameters include:

- **Enable Office Anywhere:** Select this option to activate Office Anywhere for your extension.
- **External Number:** This field specifies the number of the phone that receives calls to your extension when ***Enable Office Anywhere*** is selected.

  Pressing the arrow on the right side of the field displays phone numbers that you previously specified as your external number.
- **Activation:** This option specifies the time when a Office Anywhere call is connected. Select the desired ***Activation Settings*** radio button.
  - — ***Accept Call by pressing '1':*** The user is prompted to press the numeric key '1' upon receiving an Office Anywhere call. The system connects the call when the user presses the key.
  - — ***Accept Call by answering:*** The call to the Office Anywhere device is connected when the user takes the device off hook.

- **Clear Previous Numbers**: Press this button to remove the numbers listed on the *External Number* and Assignment bar drop-down menus.

A.2.6 Find Me

Find Me call handling allows callers who reach your voice mail box try to reach you at alternate numbers. You can specify up to two alternate numbers for routing inbound callers trying to contact you. Refer to Section 4.5.6 on page 51 for more information about Find Me.

The **Find Me** panel, shown in Figure A-6, specifies Find Me destinations and configures other Find Me parameters.

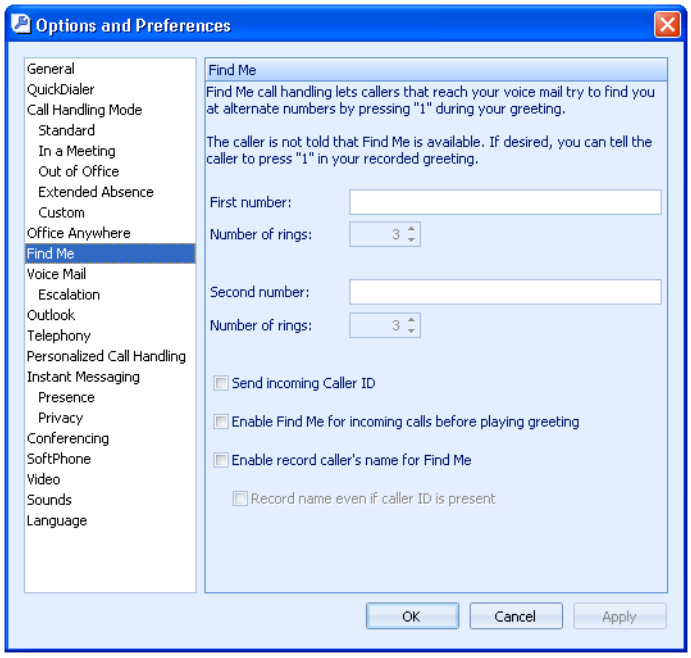


Figure A-6 Options and Preferences: Find Me panel

To access the Find Me configuration panel, open the Options and Preferences window and select *Find Me* in the menu on the left side of the window.

Find Me panel parameters include:

- **First Number**: This parameter specifies the number of the first device to which callers are routed.
  - *Number of Rings* specifies the times that Find Me rings this number before sending the caller to the second number or voice mail.
- **Second Number**: This parameter specifies the number of the second device to which callers are routed.
  - *Number of Rings* specifies the times that Find Me rings this number before sending the caller to voice mail.
- **Send Incoming Caller ID**: This option programs Call Manager to send the Caller ID of the inbound call to the Find Me number.
- **Enable Find Me for incoming calls before playing greeting**: Selecting this option routes calls to the Find Me device without requiring the caller to press '1'.

- **Enable record caller's name for Find Me:** This option enables Announced Find Me, which provides for the recording of the caller's name for calls routed to Find Me destinations. Callers routed to the user's Find Me destination are prompted to record their name, which is then played to the call recipient before answering the call.
  - — ***Record name even if caller ID is present:*** Selecting this option requires all callers forwarded to the Find Me destination to record their name for playback to the recipient, regardless of the availability of their Caller ID. This excludes internal users whose name was previously recorded.

A.2.7 Voice Mail

The Options and Preferences Voice Mail panel, shown in Figure A-7, specifies the default interface for listening and recording voice messages, records your spoken name that the system plays to callers routed to your mailbox, and configures your voice mail password.

To access the Voice Mail panel, open the Options and Preferences window, then select *Voice Mail* in the menu on the left side of the window.

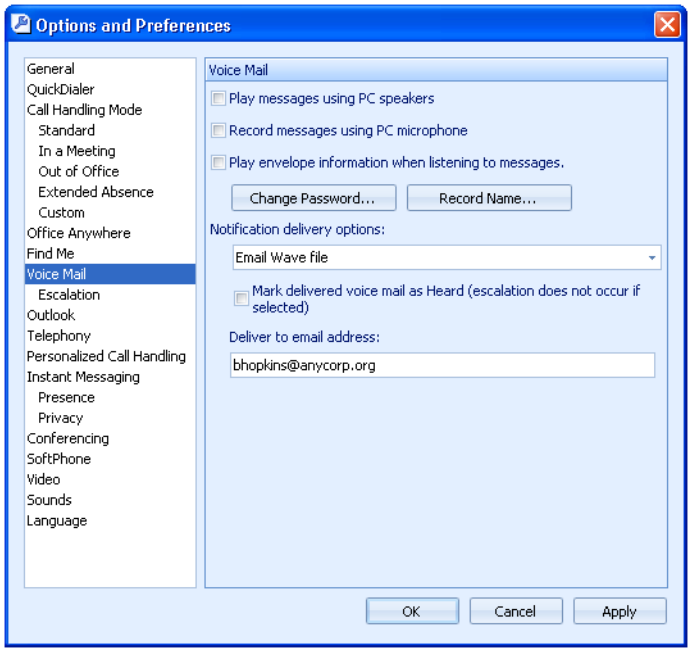


Figure A-7 Options and Preferences: Voice Mail panel

Voice Mail panel parameters include:

- **Play Messages via PC Speakers:** Select this option to program Call Manager to play your voice messages through your computer speakers instead of your phone.
- **Record messages using PC microphone:** Select this option to record voice messages through a microphone that accesses your computer's sound card.
- **Play Envelope Information When Listening to Messages:** Select this option to play sender and receipt time information prior to listening to a voice message.
- **Change Password:** Press this button to change the password that protects access to your voice mail.
- **Record Name:** Press this button to initiate the recording of your name. This recording is played for callers when they are routed to your voice mail.

- **Notification Delivery options:** This parameter specifies the media the system uses to inform the user of the receipt of a voice message. Delivery options available through the drop down menu include:
  - — ***Disabled –*** Selecting this option disables Escalation Notification.
  - — ***Email Wave file –*** Selecting this option initiates an escalation by sending a copy of the voice message to the specified email address.
  - — ***Email notification –*** Selecting this option initiates an escalation by sending an email message that announces the receipt of an voice message to the specified email address.
- **Marked delivered voice mail as *Heard*:** Select this option to mark the voice message as **Heard** when a notification message is sent to the specified address. This option is available only if ***Notification Delivery options*** is not set to *Disabled*.

  The system does not initiate Escalation when this option is selected.
- **Deliver to Email Address:** This parameter specifies the address to which the system sends the initial notification message specified by the ***Notification Delivery Options*** setting.

A.2.8 Escalation

Escalation Notification is a Voice Mail delivery method that defines a list of addresses that the system can contact when you receive messages that require immediate attention. Section 9.5 on page 115 describes Escalation Notification.

The Escalation panel, shown in Figure A-8, displays a list of your Escalation Profiles. You access an Escalation profile by double clicking its name in the table.

To access the Escalation panel, open the Options and Preferences window, then select *Escalation* in the menu on the left side of the window.

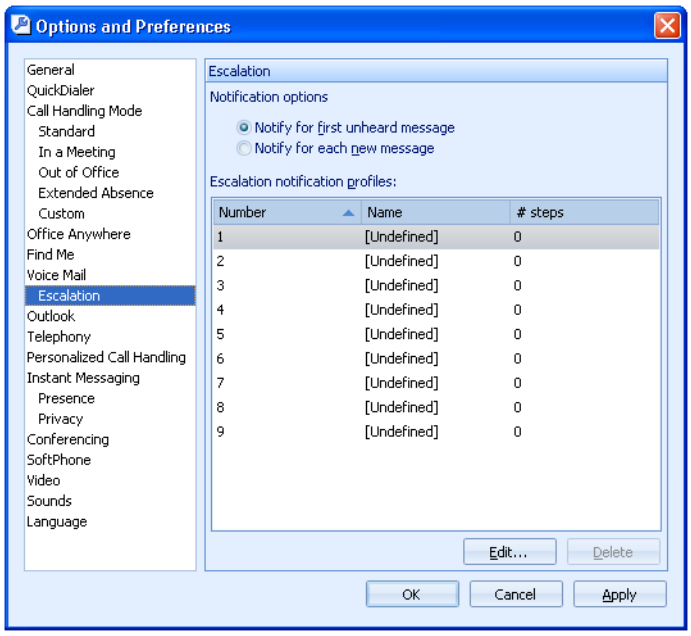


Figure A-8 Options and Preferences: Escalation panel

Escalation panel parameters include:

- **Notification Options:** This option specifies the messages that initiate Escalation instances, based on unresolved previous escalation messages.
  - *Notify for First Unheard Message* – Select this option to begin an Escalation only if the system is not currently escalating a voice message. The system quits Escalation when a voice message is marked **Heard**.
  - *Notify for Each New Message* – Select this option to begin an Escalation for each voice message, which allows concurrent Escalations.
- **Escalation Notification Profiles:** Escalation profiles designate a roster of contacts that can be notified when you have voice mail that remains marked **Unheard**. The active Call Handling Modes specifies the Escalation Notification Profile that is invoked.

  Each row in the table corresponds to an Escalation Profile. Each column lists a profile characteristic that is defined in the Escalation Profile panel.

  - *Number:* This parameter is the index number that identifies the profile.
  - *Name:* This parameter is the label by which other panels refer to the profile.
  - *# Steps:* This parameter lists the number of escalation steps in the profile.

  Escalation Notification profiles are configured in the Escalation Notification Profile panel. To open the Escalation Notification panel, double-click the desired profile in the Escalation Notification Profiles table.

A.2.8.1 Escalation Profile panels

The Escalation Notification Profile panel configures a specified Escalation Profile. To access the Escalation Profile panel, shown in Figure A-9, double-click the desired Escalation Profile listed on the Escalation panel in the Options and Preferences window.

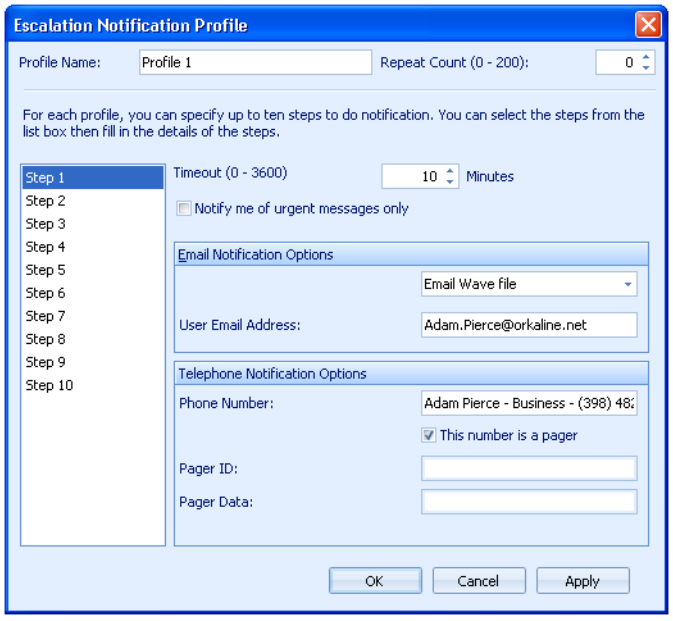


Figure A-9 Escalation Notification Profile panel

Escalation Notification Profile contains two types of parameters:

- Profile parameters apply to the entire profile and are independent of the step highlighted in the step table.

- Step parameters apply only to the step highlighted in the step table.

Profile Parameters

Profile parameters are located at the top of the panel and include the Profile Name and Repeat Count settings.

- **Profile Name:** This parameter configures the name by which the Notification Profile is referred in other Call Manager windows.

  Call Manager panels that refer to Notification Profiles by this label include the Escalation Notification panel in the Options and Preferences Window and each of the Call Handling Mode configuration panels.

- **Repeat Count:** This parameter specifies the number of times the escalation cycle is repeated after completion of the initial cycle. The cycle is discontinued when the original is marked as **Heard**.

Step Parameters

Step parameters are configured individually for each profile step. The following data fields specify the parameter settings for the step number denoted by the table.

- **Timeout:** This parameter specifies the period after the message is sent to the step contact before the system sends a notification message to the contact defined in the next step.
- **Notify me of urgent messages only:** Select this option to initiate Escalation only for messages marked as Urgent. ShoreWare allows callers to mark voice message after recording the message.
- **Email Notification Options:** These parameters specify the media and the address the system uses to inform the step contact of the voice message. Email notification options have not effect on Telephone Notification actions.

  Email Notification: This drop down menu specifies email delivery options:

  — ***Disabled:*** Selecting this option disables email notification.

  — ***Email wave file:*** Selecting this option initiates an Escalation by sending a copy of the voice message to the specified email address.

  — ***Email notification:*** Selecting this option initiates an escalation by sending an email message that announces the receipt of a voice message to the specified email address.

  User Email Address specifies the address to which the system sends voice mail notification messages. This parameter is not available when the Delivery option is set to Disabled.

- **Telephone Notification Options:** These parameters specify the phone or pager number by which the step contact is informed about the voice message. Entering contact information in the phone number field activates all other fields in this panel section.

A.2.9 Outlook

The Outlook panel, shown in Figure A-10, configures interaction parameters between Call Manager and Outlook. Chapter 12 on page 145 describes Outlook Integration with Call Manager.

To access the Outlook panel, open the Options and Preferences window and select ***Outlook*** in the menu on the left side of the window.

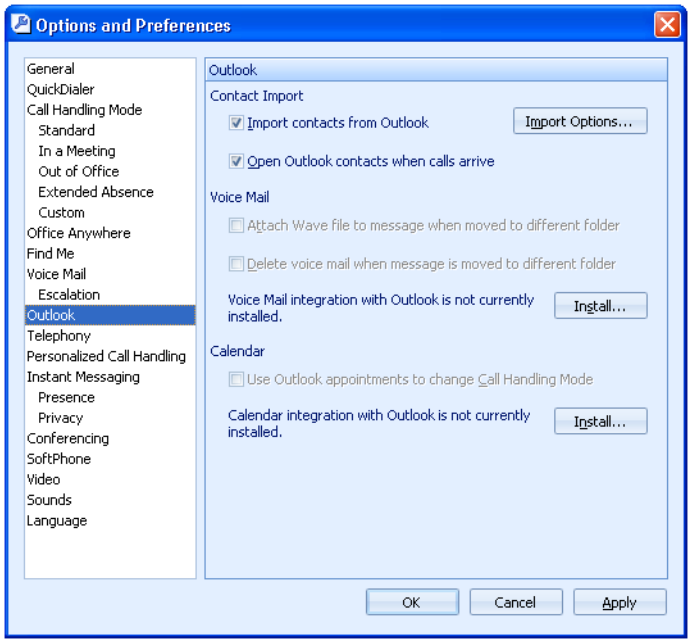


Figure A-10 Options and Preferences: Outlook panel

Outlook panel parameters include:

- **Contact Import**: These parameters control the importing of Outlook contacts.
  - — ***Import contacts from Outlook:*** Selecting this option programs Call Manager to import Outlook contacts when Call Manager is opened. Press the **Import Options** button to configure the following:
    - ▷ *Disk Cache Options* permit the storage of Outlook Contacts in your computer storage, making them available immediately upon opening Call Manager.
    - ▷ *Import Configuration* options specify the Outlook Contact folder from where Call Manager import contacts.
  - — **Open Outlook contacts when calls arrive**: When this option is selected, the Outlook Contacts panel becomes active when you receive a call from an Outlook contact.
- **Voice Mail**: This section displays the Outlook Voice Mail Integration status and specifies the disposition of received voice messages. The first two parameters are available only if Voice Mail Integration with Outlook is installed.
  - — ***Attach Voice Mail to Message when Moved:*** When this parameter is selected, moving an email from the Outlook Inbox to another folder results in the copying of the attached Voice Message .wav file to the Outlook message file.
  - — ***Delete Voice Mail from Message when Moved:*** When this parameter is selected, moving an email from the Outlook Inbox to another folder results in the removal of the attached Voice Message from the ShoreWare server.
  - — *Integration Installation status:* The message at the bottom of the Voice Mail section indicates Outlook Voice Mail Integration Status.

- ▷ If Voice Mail Integration is not installed and Outlook is available, the panel displays an **Install...** button next to the status.
- ▷ If Voice Mail Integration is installed, the panel displays an **Uninstall** button next to the status.

- **Calendar**: Calendar integration installs a Call Manager panel in the Outlook Calendar Window. The first parameter is available only if Voice Mail Integration with Outlook is installed.
  - — *Use Outlook appointments to change Call Handling Mode:* When this option is selected, Call Manager uses the Outlook Calendar to schedule changes to the Active Call Handling Mode.
  - — *Calendar Form Installation status:* The message at the top of this section indicates Outlook Calendar Integration Status.
    - ▷ If Calendar Integration is not installed and Outlook is available, the panel displays an **Install...** button next to the status.
    - ▷ If Calendar Integration is installed, the panel displays an **Uninstall** button next to the status.

A.2.10 Workgroups

The Workgroups panel, shown in Figure A-11, specifies the groups to which you belong, determines the workgroups that Queue Monitor and Agent Monitor displays, and configures Supervisor thresholds. The panel is available in Workgroup Agent, Workgroup Supervisor, and Operator Call Manager. Chapter 10 on page 125 describes Workgroups.

To access the Workgroups panel, open the Options and Preferences window, then select ***Workgroups*** in the menu on the left side of the window.

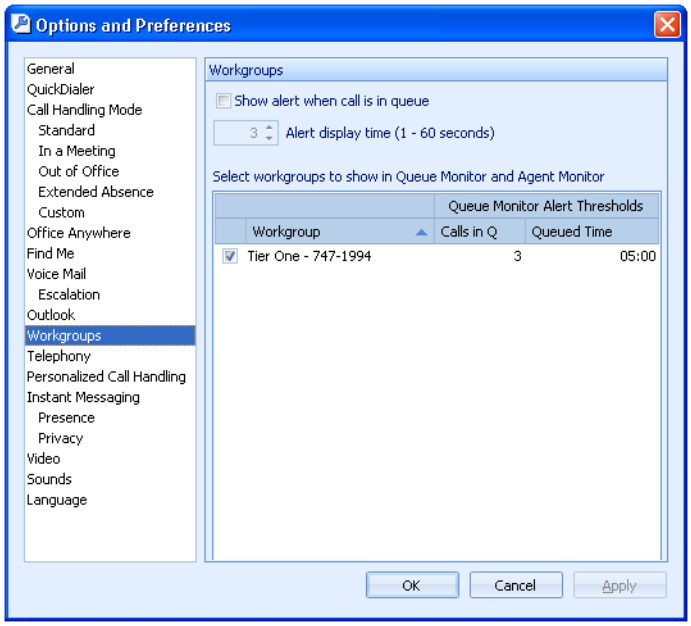


Figure A-11 Options and Preferences: Workgroups panel

Workgroup panel parameters include:

- **Show alert when call is in queue**: When this option is selected, the PC receives a popup when a call is in the queue of a workgroup to which the user is a member.
  - *Alert display time:* This parameter specifies the period the popup window is visible.
- **Table Parameters:** Each line in the table represent one workgroup. The table lists all workgroup to which you belong. Columns that the Workgroup table displays include:
  - *Unlabeled Checkbox:* Select this box to display the Workgroup in Queue Monitor and Agent Monitor.
  - **Workgroup**: This field lists the workgroup's name and extension.
  - **Calls in Q**: This column lists the number of calls required to trigger a ***threshold exceeded*** warning in the Queue Monitor. Only Workgroup Supervisors and Operator Call Manager users can modify this setting.
  - **Queued Time**: This field lists the call time required to trigger a ***threshold exceeded*** warning in the Queue Monitor. Only Workgroup Supervisors and Operator Call Manager users can modify this setting.

A.2.11 Telephony

The Telephony panel, shown in Figure A-12, specifies the manner in which Call Manager interfaces with your Telephone.

To access the Telephony panel, open the Options and Preferences window, then select ***Telephony*** in the menu on the left side of the window.

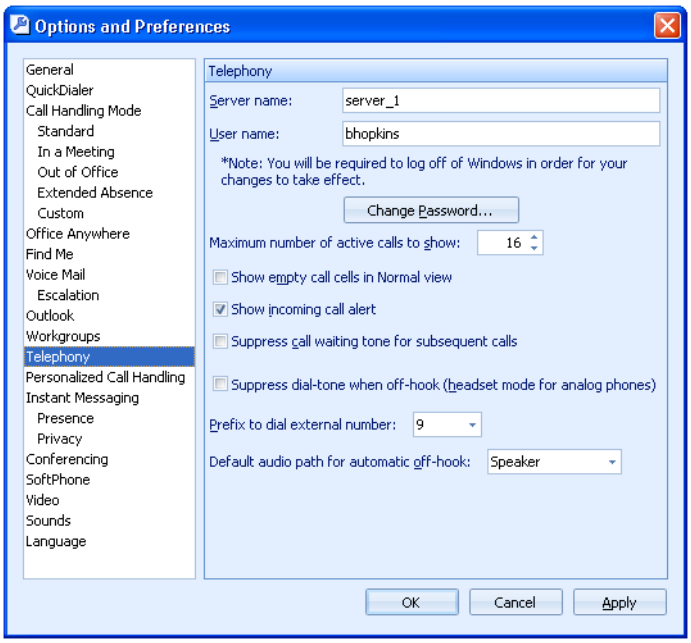


Figure A-12 Options and Preferences: Telephony panel

Telephony panel parameters include:

- **Telephony**: These parameters specify the ShoreWare user name of the Call Manager user and the Main Server location of the user's account.

  - — ***Server name:*** This parameter specifies the name or address of the Main Server.

    If this server is assigned a Primary and Secondary IP address, this parameter must be set to the server's Domain Name – not the dotted decimal notation. Contact your system administrator for information concerning the system configuration.

  - — ***User name:*** This parameter specifies the ShoreWare user name.

    This field is ***read only*** for users authenticated through Active Directory credentials.

- **Change Password:** Press this button to change the password that authorizes the user to access Call Manager.
- **Maximum number of active calls to show:** This setting specifies the maximum number of active calls your Call Manager instance can handle, as described in Section 4.3.2 on page 35. This setting is bounded by the maximum Call Stack size configured for your extension by the system administrator.
- **Show empty call cells in Normal View:** Select this option to display empty call cells in the Active Call Area of the Call Manager window.
- **Show Incoming Call Alert:** Selecting this option programs Call Manager to display an Alert in the bottom right corner of your monitor when you receive a voice call. Refer to Section 3.1.1.3 on page 20 for information about Alerts.
- **Suppress call waiting tone for subsequent calls:** Selecting this option disables the Call Waiting Tone, as described in Section 4.3.4 on page 36.
- **Suppress dial-tone when off-hook (headset mode for analog phones):** Handsfree mode enables you to use Call Manager with a headset or speaker phone instead of a receiver, as described in Section 4.3.1 on page 35. Select this option to enable Handsfree Mode.
- **Prefix to dial external number:** This parameter specifies the trunk upon which calls made through Call Manager are routed. The available options depend on the trunks configured in the ShoreWare system. Refer to Section 2.4.3 on page 17.
- **Default audio path for automatic off-hook:** This parameter specifies the audio path that Call Manager enables when you make or receive a call, as described in Section 4.3.3 on page 36.

A.2.12 Personalized Call Handling

The Personalized Call Handling panel, shown in Figure A-13, configures the user's call routing plan. Section 4.5.5 on page 44 describes Personalized Call Handling.

To access the Personalized Call Handling panel, open the Options and Preferences window, then select Personalized Call Handling in the menu on the left side of the window.

Personalized Call Handling panel parameters include:

- **Rule Table:** The rule table, located in the top half of the panel, lists the rules defined by the user and lists them in the priority Rules are listed in the order that the system uses them to evaluate inbound calls. Table columns and components include:

  - — ***Rule Buttons:*** Rule buttons are located at the top of the panel and control the creation, modification, and removal of Call Handling Rules from the Rule Table.

    - ▷ Pressing the New Rule button opens the Condition Setup panel. A new rule is added to the Rule Table upon successful completion of the setup panels.

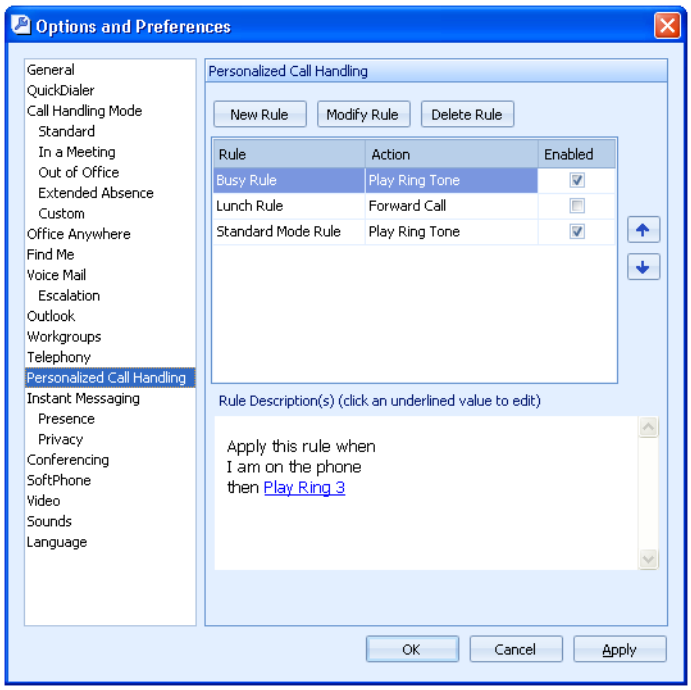


Figure A-13 Options and Preferences: Personalized Call Handling panel

- ▷ Pressing the Modify Rule button opens the Condition Setup panel and fills the parameters with the settings of the rule highlighted in the Rule Table.
- ▷ Pressing the Delete Rule button removes the highlighted rule from the Rule Table.

— ***Rule List:*** The Rule list displays the list of call handling rules defined by the user. Rules are listed in order of their usage priority; higher priority rules are listed first. List columns include:

- ▷ Rule: This column displays the name of the rule.
- ▷ Action: This column displays the call handling action triggered by the rule when the corresponding condition is satisfied.
- ▷ Enabled: This column indicates the status of the rule.

  To enable a rule, mark the Enabled box.
  To disable a rule, clear the Enabled box.

— ***Priority button:*** The buttons located right of the rule list changes the priority of the highlighted rule by moving it up or down in the rule list.

- **Rule Description:** The Rule Description field, located in the bottom half of the panel, displays the conditions and call handling actions of the highlighted rule in the Rule List. Clicking on hypertext accesses a dialog box that modifies the condition or action specified by the hypertext.

A.2.13 Instant Messaging

Call Manager users configure their Instant Messaging settings from the Instant Messaging panels. The Options and Preferences window contains three Instant Messaging panels, as described in the following sections.

A.2.13.1 Instant Messaging panel

The Instant Messaging panel specifies the IM account username and password required to access the user's IM account on the Presence Server. The panel also controls messaging display options.

Refer to Chapter 5 on page 73 for more information on Instant Messaging.

To open the Options and Preferences Instant Messaging panel, shown in Figure A-14 open the Options and Preferences window and select ***Instant Messaging*** in the menu on the left side of the window.

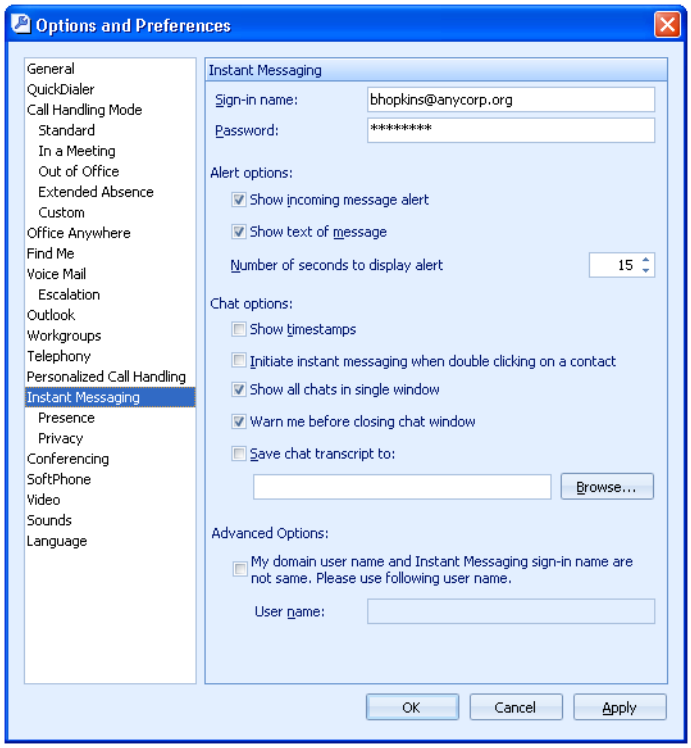


Figure A-14 Options and Preferences: Instant Messaging panel

Instant Messaging panel parameters include:

- **User name** and **Password**: This parameter specifies the IM address for which Call Manager displays instant messages. The user's IM address is configured in the IM ID data entry field in the Director's Edit User panel for the user.
- **Show Alert for**: These parameters configure the behavior of popup messages that alert the user of an incoming message.
  - — ***Show incoming message alert:*** Setting this option enables Call Manager to display popups that alert the user of an inbound IM.
  - — ***Show text of message:*** When this option is enabled, IM Alerts display the text of the inbound message.
  - — ***Number of seconds to display alert:*** This field specifies the period that IM alerts remain on your monitor.
- **Show time stamps**: When this option is selected, Instant Messaging windows display the time and date that messages were sent and received for all messages in the Instant Messaging panel.

- **Initiate instant messaging when double clicking on a contact in the Contact pane:** When this box is marked, double clicking a Contacts Viewer contact initiates an instant message to that contact.
- **Show all chats in single window:** Select this option to display all Instant Message sessions in a one message window. The session that the text panel displays is specified by chat tabs located on the right side of the window. Refer to Section 5.2 on page 73 for more information
- **Warn me before closing chat window:** Select this option to display a prompt every time you attempt to close the Instant Message window.
- **Save chat transcript to:** Select this option to save all IM conversations to the specified address.
- **My domain user name and Instant Messaging name are not the same:** Select this option if your Active Directory user name is different from your ShoreTel user name. Enter the user name recognized by the presence server in the Name field.

IM configuration options available in other Options and Preferences panels include:

- **Sounds panel:** This panel specifies the sound that the computer plays when it receives an instant message.

A.2.13.2 Presence panel

The **Instant Messaging: Presence** panel configures the IM and Telephony display options.

To open the Options and Preferences Presence panel, shown in Figure A-15, open the Options and Preferences window and select ***Presence*** in the menu on the left side of the window.

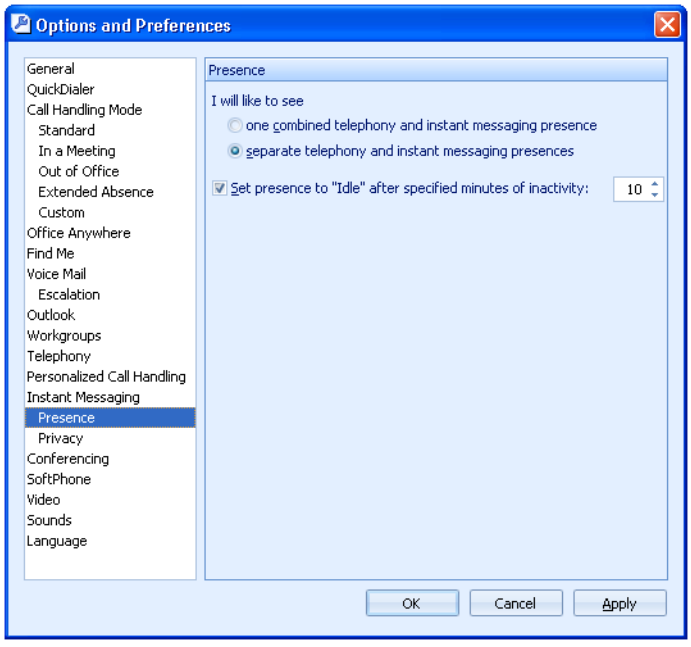


Figure A-15 Options and Preferences: Instant Messaging – Presence panel

Presence panel parameters include:

- **Presence Options:** The selected radio button specifies the presence indicators that the Contact Viewer displays:

— *one combined telephony and instant messaging presence:* Contacts viewer displays a single presence icon that indicates the user's combined presence state. Section 6.2.3 on page 80 describes the combined presence indicator.

— *separate telephony and instant messaging presences:* Contacts Viewer displays two presence icons to indicate the user's telephony and IM presence.

- **Set Presence to "Idle" after specified minutes of activity:** When this parameter is selected, the user's IM presence state is changed to Idle after the inactivity period, specified by the data entry field, at the user's computer.

  When this parameter is not selected, the user's IM presence state does not automatically change on the basis of a computer inactivity period.

A.2.13.3 Privacy panel

The **Instant Messaging: Privacy** panel controls the display of presence information to other system users. Users can also restrict Instant Messaging access to their account from this panel. Section 6.4 on page 81 describes IM Presence Privacy.

To open the Options and Preferences Privacy panel, shown in Figure A-16 open the Options and Preferences window and select ***Privacy*** in the menu on the left side of the window.

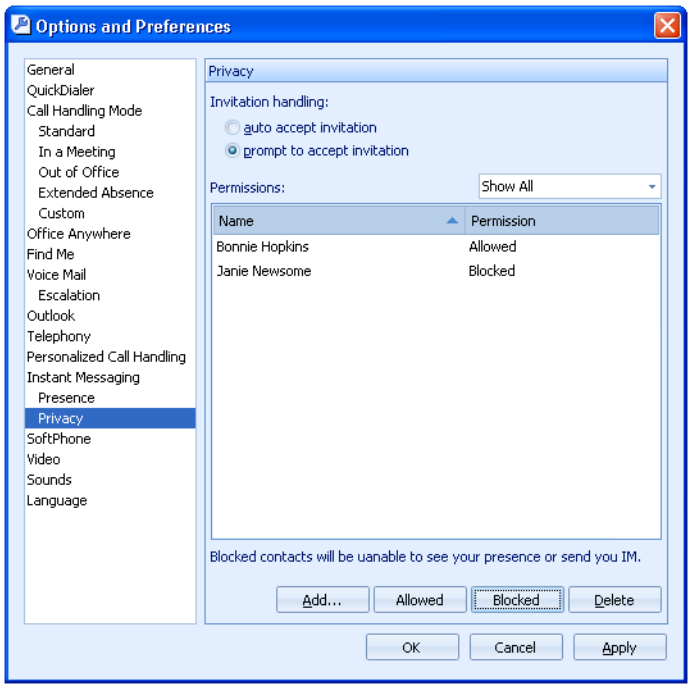


Figure A-16 Options and Preferences: Instant Messaging – Privacy panel

The Privacy Invitation settings section, located at the top of the panel, determines the user's Presence access request method when the system setting for the user is set to *User Defined*.

When the Class of Service is not set to *User Defined*, this section is grey and the option is read only. The system administrator can provide information about system privacy settings.

The invitation handling section provides the following options:

- **auto accept invitation**: All requests are accepted. When the user receives a request, a notification popup indicates a requestor was granted access to the user's presence settings.
- **prompt to accept invitation**: The user receives a popup when a another user requests presence access. The request is processed by clicking a popup option.

The Presence Permissions table, located on the right side of panel, configures the presence access setting for listed users. Users in the table are assigned one of the following permissions:

- **Allowed**: Presence information is available to users that are set to this value.
- **Blocked**: Presence information is not available to users that are set to this value. Instant Messages and presence access requests from the user are blocked.
- **Pending:** This state indicates that the user has not responded to the party's request for IM presence status.

To add a user to the list, press the Add button located below the table

To edit a user's permission setting, select the user in the list and press the Edit button.

To remove a user from the list, select the user in the list and press the Delete button.

To sort by name or permission, click on the column heading of the desired key.

To search for a name, click the Name column heading, then start typing the desired name.

A.2.14 Conferencing

The Conferencing panel specifies the user name and password of the Converged Conference account that Call Manager accesses when you initiate a Converged Conference. Section 4.7.2 on page 63 describes converged conferencing.

To open the Conferencing panel, shown in Figure A-17 open the Options and Preferences window, then select ***Conferencing*** in the menu on the left side of the window.

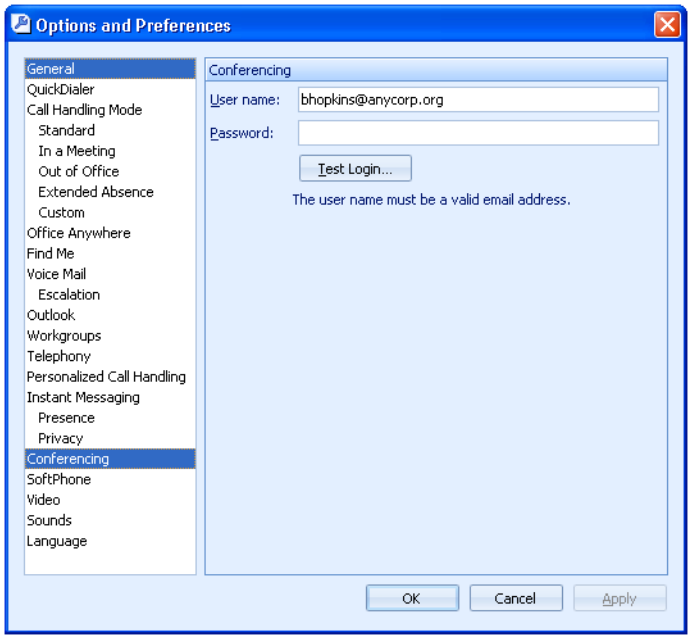


Figure A-17 Options and Preferences: Conferencing panel

Conferencing panel parameters include:

- **User name** and **Password**: These fields specify login parameters your Converged Conference Bridge.
- **Test Login**: Press this button to initiate a login attempt to the Converged Conference Bridge with the listed ***User name*** and ***Password***.

A.2.15 SoftPhone

The SoftPhone panel configures SoftPhone device settings. Section 7.3 on page 86 describes **SoftPhone** panel.

To access the SoftPhone panel, shown in Figure A-18, open the Options and Preferences window and select ***SoftPhone*** in the menu on the left side of the window.

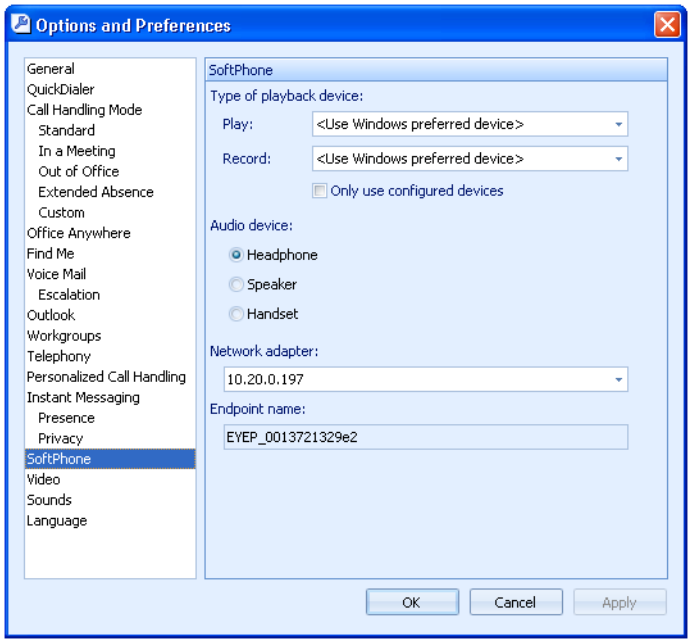


Figure A-18 Options and Preferences: SoftPhone panel

SoftPhone panel parameters include:

- **Sound Devices**: These data entry fields specify the sound device that SoftPhone uses. Sound devices available to your computer are listed in **Control Panel: Sounds** in Vista or **Control Panel: Sound and Audio Properties** in other operating systems.
  - — *Play:* This option specifies the device SoftPhone uses for playing audio transmissions to the user. Drop down menu contents is derived from the available devices in the Sound and Audio Properties panel that is accessed through the MS Windows Control Panel.
  - — *Record:* This option specifies the device SoftPhone uses for receiving audio transmissions from the user. Drop down menu contents are derived from the available devices in the Sound and Audio Properties panel that is accessed through the MS Windows Control Panel.
  - — *Use Only Configured Devices:* Selecting this option restricts the list of available devices in the Recording and Playback menus to those previously configured through MS Windows.

- **Audio Device**: This option specifies the device through which the user accesses SoftPhone.
- **Network adapter**: This option specifies the Network Interface Card through which the SoftPhone performs audio calls.
- **Endpoint Name**: This data field identifies the string through which ShoreWare controls the SoftPhone as an MGCP device.

A.2.16 Video

The Video panel configures Video Call settings. Section 4.7.3.5 on page 65 describes the **Options and Preferences: Video** panel.

To access the Video panel, shown in Figure A-19, open the Options and Preferences window and select *Video* in the menu on the left side of the window.

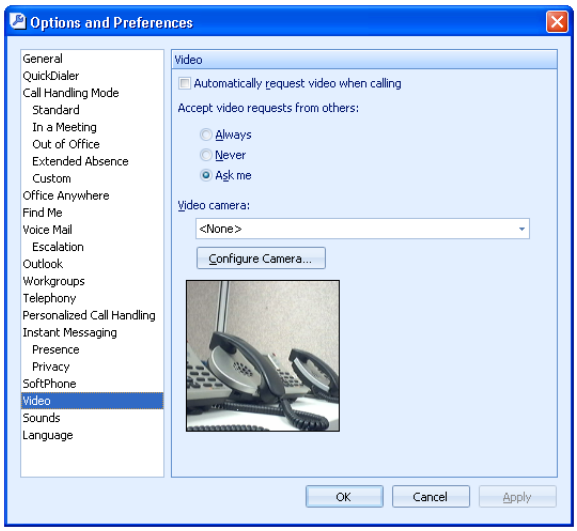


Figure A-19 Options and Preferences: Video panel

The following parameters are configured from the Video Options and Preferences panel:

- **Automatically request video when calling**: Users select this option to request a video call when initiating voice calls with users authorized for video calls.
- **Accept video requests from others:** This option programs a user's automatic response to video call requests.
  - — *Always:* Select this option to enable video when the initiator requests video.
  - — *Never:* Select this option to reject all initiator requests to use video. You can activate video later in the call even when this option is selected.
  - — *Ask me:* Select this option to receive a video inclusion prompt when an initiator requests video.
- **Video camera**: This parameter specifies the video device that Call Manager uses to perform the video call.
- **Configure Camera**: Pressing this button accesses a panel that configures brightness, contrast, and saturation settings for the video device.

While many cameras compensate for poor lighting conditions, this compensation usually impacts the frame rate of the device. Using optimal lighting conditions is essential to ensure the proper frame necessary for good image quality.

A.2.17 Sounds

The Sounds panel, shown in Figure A-20, specifies the sound files that the computer plays to indicate a communication event. Call Manager supports wav files for play audio alerts.

To access the Sounds panel, open the Options and Preferences window and select ***Sounds*** in the menu on the left side of the window.

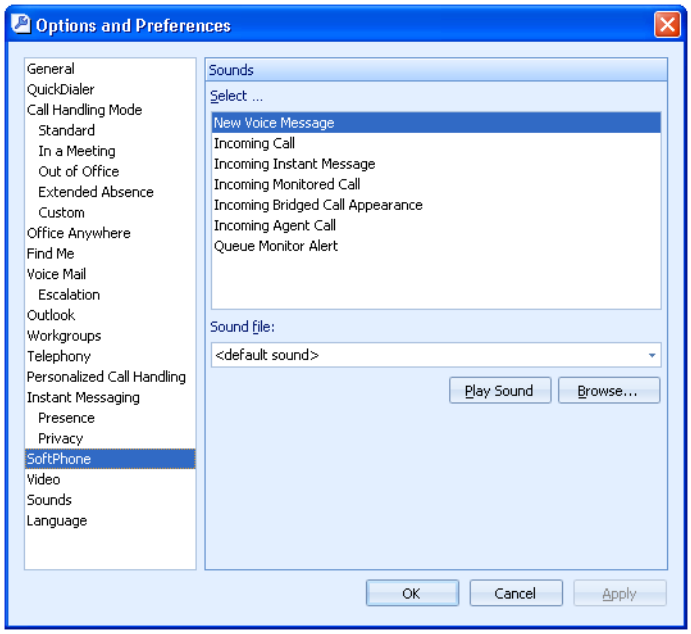


Figure A-20 Options and Preferences: Sounds panel

- **Select**: The Sounds table lists the events to which Call Manager assigns a wav file. Other panel settings are valid for the highlighted event.
- **Sound File**: The Sound File specifies the wav file that Call Manager plays to signal the event specified by the Sounds table. Click the arrow on the right side of the data entry field to view a list of available files.
  - Press the ***Play Sound*** button to play the .wav file.
  - Press the ***Browse*** button to search your computer for additional wav files.

A.2.18 Languages

The Language panel, shown in Figure A-21, specifies the language the system uses for Call Manager panels, Voice Mail prompts, and IP Phone instructions.

To access the Language panel, open the Options and Preferences window and select Language in the menu on the left side of the window.

- **Language used in Call Manager**: This parameter specifies the language through which Call Manager panels display information.

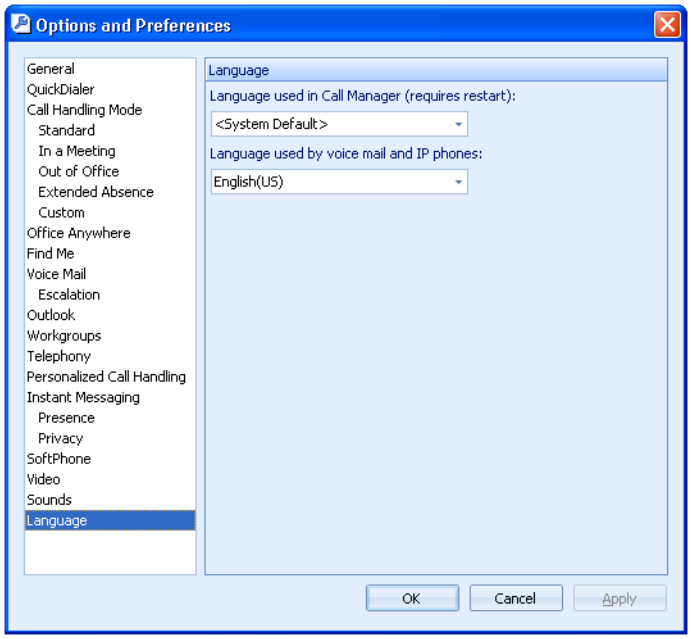


Figure A-21 Options and Preferences: Language panel

— ***System Default*** refers to the language designated by the administrator as the default language. Language changes are enabled after Call Manager is exited and restarted.

- **Language used by voice mail and IP phones**: This parameter specifies the language the system uses from your IP Phone display messages and voice mail audio prompts.

Index

Symbols

.csv file, export Directory to 89
.NET Framework 13

A

active call area 23
active Call Handling Mode 41
Add Contact panel 94
Agent Monitor 129–131
alert
    inbound call 38
alerts 20
AMIS voice mail 123
answering voice calls 39
application button 21
assignment bar 21
audio path, default 36
auto-attendant transfer 53
automated attendant 40
automated call handling 41
automatic off-hook 36

B

barge in 66
BCA *see bridged call appearance*
Bridged Call Appearance Monitor 131–134
bridged call appearance, description 132
broadcast distribution list 118

C

calendar integration 147
call cells 23
Call Handling Mode
    configuration panels 154
Call Handling Mode preferences 153
Call Handling Modes 41
    active mode 41
    manual mode transitions 43
call handling, automated 41
Call Manager
    exiting 14
Call Manager types
    Operator 10
    Personal 9
    Professional 9
    Workgroup Agent 9
    Workgroup Supervisor 10
Call Manager, accessing 14–15
call on hold 56
call park 57
call recording 58
call routing slips 71
call sender of voice message 114
call stack size 35
call transfer, *see transfer, calls*
call waiting tone, suppressing 36
call wrap-up 126
calls, simultaneous limit 35
closing Call Manager 14
combined presence 80
combining satellite windows 25
conference bridge 63
conference calls 60–62
Conference panel 61
conferencing preferences 170
conferencing, converged 63
consultative transfer 53
Contact Center 137
Contact viewer 92–97
contacts
    adding directory entry 89
Contacts viewer 135
contacts, importing from Outlook 145
content area 24
converged conferencing 63
conversation, Instant Messaging 74
creating an instant message 76
custom schedule 42

D

device assignment 33
dial tone suppression 35
Directory item details panel 90
Directory viewer 87–92
Distribution Lists Details panel 118
distribution lists, voice mail
    distribution lists 118–122
DTMF tones, sending 59

E

ending a voice call 59
escalation 116–118
Escalation preferences 159
escalation profile 116
escalation profile configuration 160

exiting Call Manager 14
extension assignment 33
external number prefix 17

F

Find Me 51
Find Me preferences 157
forward voice message 113

G

general preferences 151
go arrow, QuickDialer 22
guided transfers 54

H

handsfree mode 35
hardware requirements 10
History viewer 68–71
hold 56
holiday schedule 42
home device 33
hot key
    setting active call handling mode 43
    SoftPhone 85

I

importing Outlook contacts 145
inbound call alert 38
initiating an IM conversation 74
initiating voice call 37
installation 13
Instant Message window 73
instant messaging 73–76
    presence 78
instant messaging preferences 166
integrating Outlook calendar 147
intercom calls 65
intercom transfer 53

K

keypad 59

L

language 16
language preferences 173
listen to voice message 112
logging into and out of workgroup 126

M

mailbox transfer 53
mailboxes, voice mail 107
main menu 21
Main Window 19
Make New Call panel 37
making voice call 37
manipulating Call Manager windows 24–28
messages, voice *see voice messages* 108
microphone, SoftPhone 86
mode configuration panels 154
multiple voice calls 52
muting SoftPhone 86

N

night bell 40
notification escalation, voice mail 116–118
notification, voice mail 115–116

O

off-hook preference 36
office anywhere 34–35
Office Anywhere preferences 156
on-hour schedule 42
opening Call Manager 14
operating systems requirements 10
operator 126
Operator Call Manager 10
Options and Preference window 151–174
Outlook 147
    importing contacts 145
Outlook calendar integration 147
Outlook preferences 161
Outlook voice mail 146
overhead page 65

P

panels
    Add Contact 94
    Conference 61
    configuring Call Handling Modes 154
    Directory item details 90
    Distribution List Details 118
    make new call 37
    Park 57
    Transfer 53
park 57
Park panel 57
Personal Call Manager 9
preferences
    Call Handling Mode 153
    conferencing 170
    Escalation 159
    Find Me 157
    general 151
    instant messaging 166
    language 16, 173
    Office Anywhere 156
    Outlook 161
    QuickDialer 151
    SoftPhone 171
    sounds 17, 173

telephony 164
trunk access code 17
video 172
voice mail 158
workgroups 163
prefix for external calls 17
presence 77–83
instant messaging 78
telephony 77
presence types 77
Professional Call Manager 9
profile, escalation 116
profile, escalation configuration 160

Q

Queue Monitor 127–129
QuickDialer 22
QuickDialer preferences 151

R

receiving instant messages 75
record voice message 114
recording a call 58
redial button, QuickDialer 22
reply to voice message 112
requirements, system 10
routing slips 71

S

satellite window 19
combining 25
move into main window 27
separating 25
schedules 41–43
send voice message 114
sending an instant message 76
sending calls to automated attendant 40
sending calls to voice mail 40
separating satellite windows 25
silent monitor 66
simultaneous call limit 35
SoftPhone
description 85–86
device assignment 34
muting 86
SoftPhone preferences 171
sounds 17
sounds preferences 173
speed dial 104
Speed Dial viewer 104–106
starting Call Manager 14
status bar 24
step, escalation 116
subject header, voice message 114
suppressing call waiting tone 36
suppressing dial tone 35
system distribution list 118
system requirements 10

T

telephony preferences 164
telephony presence 77
tokens, QuickDialer 23
tones, sending 59
toolbars 22
transfer call
to a Directory contact 40
transfer calls
guided 54
transfer panel 53
transfer, calls
description 53–55
trunk access code 17

U

unpark 57
user distribution list 118

V

VGA Video requirements 11
video calls
voice calls
adding video 63
video hardware requirements 11
video preferences 172
view voice message information 115
viewer, Contacts 135
viewer, Directory 87–92
viewer, Voice Mail 109–112
viewers
History 68–71
viewers, Contact 92–97
viewers, Speed Dial 104–106
viewers, Voice Mail 134
voice call
adjusting volume 52
alert 38
answering 39
ending 59
handling multiple calls 52
hold 56
initiating 37
intercom 65
overhead page 65
parking a call 57
recording 58
unparking a call 57
voice mail
AMIS 123
mailboxes 107
preferences 158
sending calls to 40
transfer to 53
using Outlook 146

voice mail notification 115–116
voice mail notification, voice mail escalation 116–118
Voice Mail viewer 109–112, 134
voice message
    view information 115
voice messages
    call sender 114
    description 108
    edit subject header 114
    forwarding 113
    listening 112
    recording and sending 114
    replying 112
volume, adjusting 52

W

whisper page 67
window components 20–24
window manipulation, Call Manager 24–28
window types 19–20
windows
    Instant Message 73
workgroup
    call wrap-up 126
    loggin in and out 126
workgroup agent 125
Workgroup Agent Call Manager 9
workgroup preferences 163
workgroup supervisor 125
Workgroup Supervisor Call Manager 10